Staff Guide

for

VOLUNTEER RESOURCES

VOLUNTEER

OFFICE OF MENTAL HEALTH . OFFICE OF MENTAL RETARDATION
DEPARTMENT OF PUBLIC WELFARE
COMMONWEALTH OF PENNSYLVANIA

Staff Guide

for

Volunteer Resources

PURPOSE OF THE GUIDE

The Staff Guide for Volunteer Resources is primarily written for the use and reference of Superintendents or Directors and staff of State Institutions in the Office of Mental Health and the Office of Mental Retardation. As the principles are basic to volunteer administration, they can be adapted to the integration of volunteer resources in any program.

The Staff Guide should be made available as a reference and resource to all current and new staff members where there is a potential for the use of any aspect of volunteer resources.

Stanley A. Miller
Secretary of Public Welfare

Joseph Adlestein, M.D.
Deputy Secretary for Mental
    Health and Mental Retardation

Donald H. Jolly, M.D.
Commissioner of
    Mental Retardation

Prepared by: Division of Volunteer Resources
Office of Program Services
Department of Public Welfare

Acknowledgments

The Staff Guide is the result of the composite efforts of multi-department staff in State mental hospitals and State schools and hospitals for the mentally retarded. The Volunteer Resources Coordinators participated in the first edition (1963), either as authors of sections or as critical reviewers of the content. The original manuscript was reviewed and valuable suggestions made by Central Office staff. Superintendents and multi-department staff of institutions gave constructive assistance after careful study of the manuscript.

Few changes were necessary in the second edition (1965) or in the third edition (1968). The major change was the addition of a section on Community Resources which signifies the effect that current treatment methods were having on volunteer resources.

Demands for the material have increased to the extent that this fourth edition is necessary.

Madolin E. Cannon
Director, Division of
Volunteer Resources

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CONCEPT of VOLUNTEER RESOURCES

THE VOLUNTEER

Volunteers today come from every socio-economic group, representing a cross section of age, educational background, skills and bring with them a comprehensive knowledge of the community. The motivation of most volunteers is a real desire to make a worthwhile contribution to society.

VOLUNTEER RESOURCES

There has been an increasing interest in the development of volunteer resources in state institutions and facilities, both on the part of staff and the community. The members of the community who pioneered in this work were initially groups from community organizations. However, individuals both from within these groups and on their own began to realize that individual sustained service was a definite resource that could be used in the treatment of patients. This type of volunteer resource has become more and more valuable in the transition of the patient from the hospital to the community.

The potential for the utilization of volunteer resources exists in every institution or facility program. The basic principle upon which these resources are developed is integration within the department to provide the best utilization of these resources. Therefore, there is no volunteer program as such. This concept requires mutual staff understanding of the services involved; definition of areas of responsibility; analysis of institution and facility needs as well as an analysis of community resources; and coordination and development of plans for selection, training and supervision of volunteers and an evaluation of volunteer services. The Volunteer Resources Coordinator retains administrative supervision of volunteers. Experience has shown that volunteers can serve in all departments. As new departments develop, opportunities for the utilization of volunteer resources should be explored.

There are five categories of volunteer resources:

1) Regular Individual - with a commitment to serve on a regular basis and supervised by the director of the utilizing department or a staff member assigned by that director.

2) Group Volunteers - Groups of volunteers who provide direct services to patients under the aegis of a community organization on a weekly, monthly or occasional basis. These groups are under the supervision of an institution or facility department. The Volunteer Resources Coordinator is administratively responsible for groups.

3) Community Resources - Rehabilitative opportunities for patients to attend concerts, theaters, sports events, social functions; to utilize facilities such as bowling lanes, swimming pools, tennis courts; to be guests in the homes of volunteer friends of the institution and to visit historical, industrial and civic centers.

4) Entertainers - Individuals or groups who serve under staff supervision of the institution or facility, providing various types of entertainment but who have little direct contact with patients.

5) Donors - Individuals or groups who may not physically serve at the institution or facility but provide material or funds for the welfare of the patients.

The services of the volunteers are an essential factor in institution or facility programs. The contribution they make affects the patient, the staff and the community.

In relation to the patient, the volunteers working with staff:

1) Restore confidence and self-respect to the patient by recognizing him as an individual with dignity and self-respect;

2) Continue community contact to eliminate any feelings of isolation on the part of the patient;

3) Give the patient a contact with the community and break down his feeling of isolation;

4) Modify the patient's attitude toward the institution or community;

5) Provide more individualized attention and help to offset the institutional atmosphere.

In relation to staff, volunteers:

1) Help staff to give more concentrated services to individual patients as well as groups of patients;

2) Help staff to increase their knowledge of community resources that are available to fill patient needs;

3) Gain understanding of staff accomplishments and problems.

In relation to the community, volunteers can:

1) Create a more realistic image of the institution or facility in the community;

2) Stimulate community interest in direct services, legislation and the total rehabilitation process through realistic interpretation;

3) Help develop healthy community attitudes toward the returned patient and facilitate his return to the community.

ORGANIZATIONAL STRUCTURE

Both the institution or facility and the community are involved simultaneously in the development of the organizational structure for the utilization of the services of volunteers.

I. WITHIN INSTITUTION OR FACILITY

The first step in initiating volunteer resources rests with the superintendent or director. Most superintendents and directors realize that the accurate knowledge of an institution by a community representative can be one of the most effective methods of interpretation of the institution in the community. It is not always realized, however, that proper interpretation by the volunteer at the community level directly relates to satisfactory experience from the viewpoint of the volunteer. Therefore, it is essential that the institution take the necessary steps to provide the community representative with a true and realistic picture of the institution. This image can be adversely affected by poor methods of administration, by laissez-faire attitudes of staff and by lack of preparation for the services of volunteers. It is an economy in the long run to provide a sound administrative structure for the utilization of the community and its resources. If a true and realistic interpretation is to be given of the patients by community representatives, thoughtful groundwork must be laid within the institution.

This groundwork involves not only the interest and understanding of the superintendent or director, but the understanding by the entire staff of the purpose of volunteer resources and the function of the volunteer resources coordinator. Preparation of staff and inclusion of them in the initial planning can contribute immeasurably to acceptance of volunteer resources as an integral part of the institution program.

Volunteer resources are not free as a cursory view may indicate. There are expenditures involved for both staff and volunteers. Staff time is required for the coordination, training and supervision of volunteers.

A. Budgetary Provision

1. Staffing

a. Professional - The first consideration should be the employment of a full-time professional staff volunteer resources coordinator who is sophisticated in community organization and in the utilization and coordination of community services in an institutional setting. The responsibilities of the position cut across and involve all departments in the institution. The potentials for service by the community exist in every department. Therefore, it is administratively sound to have the position set up under the direction of the superintendent or director who may delegate some specific responsibilities to the assistant superintendent (clinical) or the clinical director, but not to any one department. In this way, the Volunteer Resources Coordinator becomes knowledgeable with the overall institution situation and can coordinate the flow of community services and materials to all departments.

The position classifications in the Compensation Plan are — *REVISION OF CLASSIFICATIONS AS OF 1980*

Class Code 4891 - Volunteer Resources Coordinator *I* (Trainee)
Class Code 4892 - Volunteer Resources Coordinator *I* ~~II~~ (Assistant)
Class Code 4893 - Volunteer Resources Coordinator *II* ~~III~~ (Director)
Class Code 4894 - Volunteer Resources Coordinator *III* ~~IV~~ (Director)

In facilities with minimal need for volunteer resources and where employment of a full-time volunteer resources coordinator would not be justified, a professional staff member with some community organization experience should be designated to develop and coordinate volunteer services. When this plan is used, definite time should be allocated in the staff worker's schedule to permit fulfilling this responsibility. Assistance from an experienced volunteer chairman, who will report to the part-time paid volunteer resources coordinator, may provide adequate continuity of service. Job descriptions should be developed for both positions and their responsibilities made clear to both staff and volunteers.

b. Clerical - Competent full-time clerical assistance (Clerk-Stenographer II) should be employed for the volunteer resources office. Clerical staff should have, in addition to the necessary clerical skills, the personal qualities necessary to meet the public and to communicate by telephone both graciously and accurately. It should be realized that one of the functions of the volunteer resources office is developing relationships with the community, as well as with the institution staff. In order to perform this function effectively with minimum misunderstandings, confirmations need to be made in writing. In addition, since the volunteer resources coordinator job is not and cannot be a desk job, but involves working throughout the institution, as well as in the community which the institution serves, it is essential that some competent

coverage be given to the office for inquiries and information, as well as for handling the business of that office. Budgetary provision should be made for a classification which would provide clerical staff with experience.

2. Office Facilities

It is important that suitable office space be provided for volunteer resources in a central location accessible to both staff and volunteers. The space should include an office for the volunteer resources coordinator where privacy is insured for interviews and telephone conversations, in addition to adjacent space for clerical staff.

Provision should be made for an area for volunteers where personal belongings can be kept, bulletin board notice space, and resource material made available. A room for meetings with community organizations' representatives should be available when needed.

The telephone in the volunteer resources office should have both inside and outside connections with adequate extensions for the staff assigned. Sufficient trunk lines are at a premium in any institutional setting, but the work of the volunteer resources office is one of hospital-community coordination. Community resources can be sharply decreased and relationships with the community can be jeopardized if provision is not made by the institution or facility so that incoming calls from the community can be handled satisfactorily.

3. Operation

In addition to budgetary provision for staff and office equipment, an operating budget should be set up to cover expenses incurred in staff travel related to job, professional literature, and for volunteer functions, such as orientation and recognition, which require certain materials which should be supplied by the institution or facility.

B. Orientation of Institution Volunteer Resources Coordinator

Upon arrival, the volunteer resources coordinator should be introduced to the institution staff and the function of the position clarified with the departments.

The orientation of the volunteer resources coordinator consists of three aspects:

Institutional Level - A planned orientation arranged by the superintendent or director, should include individual conferences with department heads and planned sessions within each department so that the

coordinator may learn about department programs and become acquainted with personnel. The coordinator should be introduced to the Board of Trustees.

Community Level - Arrangements should be made to introduce the volunteer resources coordinator to the leaders of the community organizations with whom the institution has contact. The staff worker and/or workers who have been maintaining the liaison with these organizations should participate in these meetings so that a smooth transition can be effected.

State Level - A three to five day orientation course can be arranged with the Division of Volunteer Resources to discuss overall policies affecting volunteer resources and to confer with consultant staff involved in the utilization of volunteers.

C. Methods of Operation

Periodic conferences should be planned by the superintendent or director to meet with the volunteer resources coordinator to establish and approve institution policies in regard to volunteers and to discuss current development. Administrative support is essential if the services of the community are to be used for the maximum benefit of the patients, institutions, and the community itself. Periodic conferences with administrative approval, for department heads and the volunteer resources coordinator are essential for integrated utilization of volunteers.

The volunteer resources coordinator not only should be able to communicate directly with administrative staff and other department heads, but through the establishment of some structure, be able to meet with other staff in a planning committee on volunteer resources.

Staff Planning Committee - The staff planning committee for volunteer resources sets the philosophy and concept for the services of the community within the institution, acts as a medium of communication between institution departments which are concerned with volunteer resources and formulates institution procedures with the full support of the institution team. The staff planning committee should consist of a representative from each institution department, usually the department head, and a representative volunteer. Initially all departments should be represented for mutual education and understanding, but subsequent meetings should involve only the departments concerned with the agenda to be discussed. The initiation and continuance of a staff planning committee must have the full support of the superintendent or director. Meetings should be scheduled only on the basis of need.

The objectives for staff planning committee meetings

are:

to determine interdepartmental plans which involve volunteer resources;

to determine needs for volunteer resources;

to formulate recruitment, selection, orientation, and recognition plans for volunteer resources;

to clarify policies and set up procedures affecting volunteer resources;

to provide the opportunity for exchange of information between departments and volunteer resources;

to improve communications and understanding of volunteer resources.

II. WITH THE COMMUNITY

In surveying the community which the institution or facility serves, it will be found that both individual citizens and community organizations are resources for service to patients. There are many individuals who are not "joiners" but who wish to serve their fellow men, and frequently make their interest known directly to the institution. They may also be friends or neighbors of staff or volunteers who have interpreted institution needs and have stimulated an interest to serve.

The potentials for service from organizations include civic, religious, special interest groups, youth, business, veterans, service and professional organizations from all socio-economic levels. Each organization has its own service specialty about which the volunteer resources coordinator must be knowledgeable for best coordination of institution needs and community resources. With the increasing contacts by various staff members with the community, many offers of service and assistance result. When these indications of interest and direct offers of service are shared with the related departments, including volunteer resources, the resources of the community can be mobilized best for integrated and coordinated services to patients. Many organizations provide, or have the potential to provide multiple services to the institution which, for good public relations and service to patients, requires joint planning of staff, coordinated by volunteer resources. In some instances the interest of the local branches or chapters may far exceed the current needs or readiness of the institution to utilize their resources while,

in other instances, there may be organization apathy or prejudice toward service to an institution or facility.

Initially it is practical to work with organizations on an individual basis for mutual education and coordination of available services with institutional needs which may be for direct service, material or utilization of facilities. Many state and national organizations have standing committees, members of which work with the health fields. A working arrangement should be developed between the chairmen of these specific committees and the volunteer resources coordinator.

It is feasible, on occasion, to invite representatives of active interested organizations to meet to ask their assistance in particular projects which the institution is planning. The number of organizations invited to participate should be in direct proportion to the needs. This type of committee exists only for the period needed to accomplish the purpose and would not be a continuing committee. Committees of this type are helpful in recruiting volunteers, holiday programming and other institution projects.

Community Council - After internal groundwork is laid for the integration of volunteer resources into the institution program, the staff planning committee on volunteer resources may consider the advisability of developing a community council for the institution, comprised of representatives from organizations who have demonstrated continued interest and service to the institution and institution staff representatives. The purpose for such a council must be clearly defined and understood by both the community and the institution. This type of council may facilitate: (1) the coordination of institution needs with community resources for service, volunteers and materials; and (2) the dissemination of accurate information to and from the community for the patients returning to the community.

In widespread geographical areas, other methods to facilitate coordination of community resources with institution needs are: (1) working with the local branch of a state organization which will coordinate services of their branches within the counties served by the institution; and (2) selection of an experienced volunteer to work with multiple organizations in various regions served by the institution.

IMPLEMENTATION

To implement volunteer resources, department heads and the volunteer resources coordinator must determine the staff attitude and experience with volunteer services. Methods of mutual education and understanding should be established. Attitudes of nonacceptance of volunteer resources will change more quickly into those of acceptance if emphasis is placed on the readiness and needs of the individual departments. Moving into the development of volunteer resources at a realistic tempo can pay dividends for future utilization. Satisfactory service by volunteers on a small pilot study basis can do much to develop better understanding of the purpose of community services within the institution setting.

I. REGULAR INDIVIDUAL VOLUNTEERS

A. Determining Needs

The department heads with the volunteer resources coordinator can determine areas of services and readiness of staff for the utilization of volunteers through individual conferences and intradepartmental meetings. The department heads should include their staffs in analyzing areas of need, development of service guides which describe the jobs, and methods of on-the-job training and supervision.

The service guide for volunteers, MH/MR-574 1/ helps to clarify the job of the volunteer for both the using department and the volunteer resources department. The service guide can serve several purposes, such as: (1) recruitment; (2) interpretation of job opportunities to applicant; (3) information to new staff members; (4) placement of volunteers; (5) changes and trends within departments; and, (6) interpretation to institution staff and the community of the role of volunteers in the treatment program and transitional planning for the patient.

The service guide should be made available to the volunteer and to the staff involved in the supervision of the described job. Some jobs are especially flexible but guide lines should be set up in the service guide.

Existing services which filled a need when initially requested by a department may, after a period of time, become outmoded. A service of long standing can become traditional and it is well to re-evaluate its worth through departmental conferences and/or to direct the services into more appropriate areas.

Junior Volunteers - The hours of service by junior volunteers must not exceed the following: during the school year a maximum of three (3) hours per school day and twelve (12) hours per week. During vacations, a maximum of six (6) hours per day and thirty (30) hours per week. In service guides 1/ for jobs to be performed by junior volunteers and any specific limitations by this age group should be clearly defined according to current Child Labor Law. See DPW Manual Section 8463.2 and MH/MR-1968-12.

B. Recruitment and Selection

As the institution needs are being determined, the volunteer resources coordinator can utilize the following contacts for making known recruitment potentials for volunteers.

Staff of Institutions and Board of Trustees-should be kept informed of recruitment plans and needs for volunteer resources.

Regular Volunteers - the best recruiters are enthusiastic volunteers who encourage others to serve.

Community Council of the Institution or Local Organizations serving currently.

Existing Community Recruiting Resources - such as Volunteer Bureau, American Red Cross, Junior League, local Mental Health Associations and Associations for Retarded Children.

Other Community Organizations - including youth organizations for junior volunteers.

Mass Media - carefully prepared material for newspaper, television, radio, church, industry/business employe publications, and organization bulletins should be geared realistically to actual volunteer services.

The geographical location of the institution and the recruitment needs should determine how far-reaching or extensive the recruitment should be. Person to person contact is the best recruitment device and is more effective than the written word.

The staff planning committee, with the volunteer resources coordinator, should establish criteria in relation to the acceptance of applicants who are expatients, former professional staff workers, currently employed staff, board members, and immediate relatives of staff in positions of authority at the institution. The staff planning committee, with the volunteer resources coordinator, should determine the methods to be used. Similar personnel practices which are established for paid personnel should be considered for regular volunteers. All

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applicants for regular volunteer service should recognize that they are making a commitment for regular dependable service, that they are responsible for their own transportation arrangements, and that they should be in good health.

In regard to the current employed staff serving as volunteers, the Fair Practices Work Act states that employees, under pay range 32, be compensated for time and one half for all hours of required work beyond their regular work week. Employees may volunteer their services, however, at their institution providing the service has no relationship to the individual's paid work assignment.

The minimum age for regular volunteers is sixteen years. The age group between sixteen and eighteen are considered junior volunteers. It is the responsibility of the junior volunteer applicant to obtain written parental (guardian) consent to serve as a regular volunteer.

The application form, MH/MR-570, 2/ is completed by regular individual volunteers. The use of an application form is recommended. This information can be useful in the interview and kept on file for future reference as well as the placement. Notes on the interview should be made for future reference. The two-way interview gives an opportunity for the applicant to gain information on the available jobs and for the interviewer to gain insight into the personality, interest, and motivation of the applicant.

C. Orientation and Placement

For the new volunteer who has been accepted for service in the institution, the necessity for a basic orientation course 3/ conducted by institution staff is paramount. Just as the new employee must be introduced to the agency and its work, the layman needs the opportunity for an indoctrination to the overall institution situation. The primary objective is to give the volunteer general knowledge of the institution, its administration, its mission, and introduction to the treatment program. The staff planning committee on volunteer resources can be helpful in setting the content, method of presentation, faculty, time and length. All these phases should be geared to the indivudual institution and its current need for volunteers.

The volunteer resources coordinator assumes responsibility for coordinating and arranging the orientation program. The course should be conducted by department heads or designated representatives, experienced volunteers, and patients where indicated. Consideration should be given to the selection of the best qualified speakers who have an understanding and interest in volunteers as well as an effective manner of presentation. Occasional evaluations of the course by the

staff planning committee allow for recommendations, shifts in faculty, and direction for future courses.

The process of orientation has merit in that it serves as an additional screening device. The volunteer has a closer look at the institution situation and the staff has an opportunity to detect interests of the new candidates which aid in the placement within the institution, or qualities which suggest referral to another agency.

In some instances, recruiting agencies or community organizations conduct orientation classes. However, these cannot be considered a substitute for the institution orientation by the staff. This introductory process should give the volunteer the assurance he needs to enter his new role and to indicate that his contribution to the institution program is needed. Occasionally circumstances justify placement of an individual volunteer in a particular assignment with the understanding that the volunteer will complete the next orientation course. Some briefing to the institution and on-the-job training are essential at the time of acceptance.

The successful matching of a volunteer to a duty or task in the institution is important and is the responsibility of both the volunteer resources coordinator and the requesting department. The kind and amount of supervision available with the department needs to be considered, as well as the capabilities of the volunteer. The service guide developed by the department requesting the service and the preference of the volunteer are utilized in effecting the proper placement. The use of these good personnel practice tools leads to mutually satisfactory, realistic placements. Periodic evaluation should determine the volunteer's readiness to move to greater responsibility.

The placement process should embrace both firmness and flexibility in moderate degree to allow for structure and substance to the assignment as well as fluidity for movement into greater or different experiences. Only then can the placement procedure have real value as it becomes a dynamic program rather than a static one. This re-emphasizes the responsibility of the volunteer resources coordinator periodically to evaluate the placement with the using department and the volunteer.

D. Supervision, Training and Evaluation

After a volunteer completes the orientation course given by the institution staff, he is ready to begin his first assignment.

Supervision provides actual guidance to the volunteer, sharing information and experience with him and furnishing him with direction when needed. Although the volunteer resources coordinator has the total

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3/ Appendix, pages 29, 30

administration of volunteers in the institution, individual departments are responsible for the day-to-day guidance, training, and evaluation of volunteers within the departments. Time spent in two-way or multiple way communication between staff and volunteers can be an economy in terms of quality and length of service by the volunteer. It will also insure more effective service to patients.

In regard to junior volunteers, careful preliminary training and continuous on-the-job supervision should be given. A close working relationship should exist between the staff worker and the junior volunteer.

E. Recognition

Recognition of the volunteer starts before the volunteer comes to the institution. A feeling of recognition is created by the obvious need for the volunteer to serve in the program for patients. The volunteer should feel that much care and planning has been done to prepare for the initial interview with emphasis on the fact that every applicant has potentially something to offer. A service guide showing staff consideration and thought should be available to define the job for the volunteer.

Volunteers should keep the staff informed of their absences and any changes in schedule which would affect services to patients. In turn, staff should extend similar consideration and be prepared for the volunteer's assignment.

Volunteers should be given added responsibilities as they become more efficient in their assignments. Participation in staff meetings on specific areas of development could provide an excellent means of sharing ideas and planning together.

The most formal methods of recognition are:

1) presentation of the standard recognition pin 4/ for regular volunteers who meet the criteria; and

2) presentation of Standard Certificate of Appreciation 5/ for regular volunteers who meet the criteria.

The Staff Planning Committee on Volunteer Resources, in establishing the specific criteria for these awards, should require a high level of achievement for eligibility. The standard recognition pin indicates the experienced volunteer and should be worn at all times when on duty.

Other methods of formal recognition may be invitations to volunteers by staff and patients to a tea, reception or special program at the institution.

II. GROUPS

The general philosophy which applies to the regular volunteer also applies to volunteer groups or individuals who serve occasionally or periodically.

A. Determining Needs

The needs of the department within the institutions must be determined. Again the readiness of the department and its personnel must be considered even though there are pressures from groups who wish to serve. The staff planning committee, department and interdepartmental meetings, and conferences with department heads will help to achieve this readiness.

After a period of months or years, the needs may change. Therefore a review, analysis and evaluation of both needs and services should be made periodically.

B. Recruitment and Selection

A survey of community resources should be made to determine community interest. Information on community resources should be obtained both within the institution (for resources already established) and within the community (for potential resources).

Recruitment methods for volunteers in groups would be the same as those used for individual volunteers. Selection of the group should be made on the basis of the readiness of the group to perform the needed services. In recruitment and selection of youth groups, consideration should be given to the age range of the group members in relation to the type of service which can be performed. Youth groups are always accompanied by adult leaders or sponsors.

C. Orientation and Placement

Each group which is recruited and accepted for a specific responsibility should have a brief orientation geared to the type of service which will be performed. This should include general information about the institution, administrative policies, procedures which affect the group's service and specific information related to participation. Each subsequent service by the group, because of the infrequency and the posibility of new participants, should be preceded by another briefing period to bring the current situation to the group.

Successful placement is important to both the using departments and the volunteer groups. The requests of the department and the preferences of the groups can usually be matched.

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5/ Appendix, page 54, 55, 56, 57

D. Supervision, Training and Evaluation

Following placement, on-the-job training should begin with orientation to the area where the service will be performed, to the specific job responsibilities, and to the methods to be used in performing the service. The type of service may vary and might include a ward party, an activity for a ward although not in the ward area, a trip, a monthly birthday party for everyone in the institution with a birthday during the month. Where groups serve weekly/monthly, effort should be made to bring the patients into the planning of the program, recognizing their potential and helping them to develop this. These groups should add 'working with the patient' to the usual 'giving to' and 'doing for' the patient. The institution responsibility and that of the volunteer group should be clearly defined and may vary according to the activity.

The planning for the use of the groups should include continuous supervision and periodic evaluation.

The training, supervision, and evaluation of volunteer groups should exercise the same principles as those used for individual volunteers. Records of performance and evaluation should be kept.

E. Recognition

Both formal and informal recognition of group service should be made. Informal recognition for all groups would be the immediate expression of appreciation of staff and patient. The most formal recognition to the groups who serve regularly is the Standard Certificate of Appreciation *5/* for groups who meet the criteria. These are usually presented to the organization at a formal recognition ceremony at the institution or in the community. The method of formal group recognition should be decided by the Staff Planning Committee.

For groups who serve once or occasionally, formal recognition would be the immediate realistic letter of acknowledgment to the organization.

III. ENTERTAINERS AND SPECIALISTS

Entertainers and specialists are individuals or groups who come to the institution to perform a specialized service. Generally, they have little patient contact. They should know in advance the type of patient they will be entertaining and the program should be appropriate for these patients.

A. Determining Needs

Departments should request volunteer entertainers in the same way that other commitments of volunteers are

requested. Frequently entertainers offer their services to various departments or to individual staff members. When this occurs, the offer of service should be directed through the proper channels for confirmation and arrangements.

B. Recruitment and Selection

In some cases, entertainers and specialists might be recruited from the same organization as other volunteer groups, or specialized talent groups (such as theater, art, music, church choirs, etc.) who do only this type of volunteer service may be available. The type and quality of program should be carefully selected. This is especially true of amateur groups whose performances may be acceptable to parents and friends of the performers but are not of high enough quality to hold the interest of the patients. Selection of the areas in which a performance is given is important. A program suitable for a small group on a ward might be completely inadequate in a large auditorium.

C. Orientation

As with other groups, some orientation is necessary but may be even more abbreviated, particularly if there is little patient contact. This varies with the groups and the program. The briefing is necessary, however, to give the group members some understanding of the institution and to assist them in having a meaningful experience. The briefing may need to include an interpretation of patient response or lack of it.

D. Scheduling and Supervision

A resource file should be kept in the office of the volunteer resources coordinator. Scheduling is an important phase of entertainment groups, as it is possible to be overloaded at some seasons of the year. Integration into existing and on-going program is necessary.

Part of the supervision of entertainers must include advance planning as to details of production. This would include place, equipment, and leadership. The program should be evaluated and recorded, with recommendations for the future.

E. Recognition

Whether this is an occasional visit, an annual event, or a one-time visit, recognition should be based on the same criteria as for other groups.

IV. DONORS

The direct personal service of individuals or groups, i.e. 'the giving of self' is the highest form of giving. However, there are many individual and/or groups who

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cannot serve within the facility or institution but who will provide donations either material or monetary. In order to insure proper utilization of these resources, it is necessary to have a realistic appraisal of the needs of the institution for such donations.

The community should not be expected to provide funds and/or equipment which properly should be included in and covered by the institution or facility budget through funds appropriated by the legislature. The overall state policy concerning contributions is covered in the DPW Manual 7600 Acceptance of Gifts and 7630 Solicitation of Funds. It should be understood that this policy precludes any state employee from solicitation of any kind. However, since individuals and groups do offer funds and material, the institution should know those needs which are not available through state sources and which fill a realistic need for the welfare of the patients.

All offers of contributions from the community and any requests from the institution departments should be channeled through and coordinated by the volunteer resources office just as direct services given by the community are channeled and coordinated. Such coordination tends to insure that the needs of the institution are properly interpreted to the community, that contributions are directed to the appropriate departments, and that suitable acknowledgement and follow-up with the donor can be accomplished.

It is the responsibility of the volunteer resources coordinator to keep the superintendent and director, and institution staff informed of all offers of services by donors. For the guidance of the volunteer resources coordinator, the staff through the staff planning committee should establish criteria for receipt (or rejection), utilization, maintenance, and accountability of all contributions.

In the interest of good community-institution relationships, great care should be taken to insure that demands are not made on the community that would tend to strain its available resources. Donors should be encouraged to make their contributions in kind rather than funds and to participate to the greatest extent possible in the purchase and utilization of the donation. Proper interpretation to the public will result in donations that will enrich the life of the patients and which serve as a reminder that the community cares.

V. COMMUNITY RESOURCES

As the doors of the institutions have opened to the community, so have the doors of the community opened to patients. Opportunities for patients to experience and participate in the mainstream of community living have developed and offer a wide delivery of experiences. Individuals who need support in re-entering community life are invited to the homes of experienced volunteers or accompanied by them for shopping, appointments of all types and attendance at community functions of interest to the patients.

Facilities such as bowling lanes, swimming pools and tennis courts are becoming routinely available for individual and groups of patients as part of the planned treatment program. Use of community facilities augment those of the institution and provide opportunities for patients to associate with the community. Tickets are donated for all types of sports events, concerts, theatrical productions and exhibits. Patients with specific interests, such as gardening, art, etc., may enter local shows and exhibits along with community hobbyists.

The resources within the community are unlimited and are just being tapped. Early consideration of resources by the staff is essential for advantageous implementation of the transition of the individual patient into the community. The volunteer resources office should be the focal point in helping to coordinate needs with voluntary community resources, which may include service by experienced volunteers as well as arrangements with the community. It is becoming more and more apparent that the greatest asset of the volunteer is his potential to make easier and more comfortable the patient's return to the community.

ADMINISTRATIVE PROCEDURES

The establishment of professional administrative procedures for volunteer resources is important. Copies of the Department of Public Welfare policies affecting volunteers or the volunteer resources coordinators should be maintained in the volunteer resources office. General policies of the institution in regard to ordering supplies and equipment, expense accounts, maintenance procedures, etc., should be a part of the orientation of a new coordinator and such information should be kept on file for ready reference. Adequate files to cover the business of the department should be set up. In addition to the standard reports and records required in the Division of Volunteer Resources, records and reports should be developed to suit the needs of the individual institutions or facilities.

I. RECORDS

Records are important as a means of interpretation and of integration of the community into the treatment program and to provide factual information for reports and recognition. They are important also to the superintendent/director, board of trustees, institution, central office, and regional staff, on changes, trends and current volunteer resources.

A. Regular Individual Volunteers

1. Application for Regular Individual Volunteer Service, MH/MR-570 [2]

Following the practices of good business administration, separate forms are used for the application and personnel record for regular individual volunteers. Each form has a unique function.

The Application for Regular Individual Volunteer Service, MH/MR-570, serves as a declaration of interest and intent to become a volunteer. The applicant states his qualifications in his own words and in so doing he is likely to have a feeling of commitment as a volunteer.

2. Regular Individual Volunteer Personnel Data, MH/MR-571 [6]

The Regular Individual Volunteer Personnel Data, MH/MR-571, is a permanent personnel history card. After the volunteer completes the orientation course and receives his assignment, the volunteer resources office extracts the desired information from the application and records it in a condensed form on the Volunteer Personnel Data Card. The format and content parallel that of the application intentionally in order to facilitate the transfer of pertinent information.

Evaluative comments relating to service, important reassignments, referrals to other hospitals, special leaves of absence, etc., are noted on the reverse. Such comments are useful in many ways but are particularly valuable when references are requested. No provision is made for recording assignments since these may be diversified or subject to change thus requiring up-dating.

After the information is recorded on the MH/MR-571, the application need not be retained. What the applicant has recorded in his own words is not as important as the shortened version entered on the permanent record by the volunteer resources office. However, for recruiting purposes it may be advisable to keep those applications by promising candidates, who, for valid reasons are unable to complete the orientation course or are not available for placement at that time.

3. Regular Individual Volunteer Service Report, MH/MR-572 [7]

Regular Individual Volunteer Service Report is available to institutions or facilities whose volunteers do report to a central place to sign in. This form may be located in the supervising office, volunteer resources office, or some other practical location. The sign-in form may be combined with the daily log book.

4. Group/Entertainers Volunteer Service Report, MH/MR-572A [8]

This form contains pertinent information from the Chairman of the Group regarding the activity and can be used as a resource to recruit prospective volunteers.

5. Regular Individual Volunteer Master Service Record, MH/MR-573 [9]

The Regular Individual Master Service Record is a six year record of hours served, leave taken, training, and recognition given and is used for all regular individual volunteers. The data recorded facilitates monthly reporting.

6. Master Schedule

A master schedule of regular volunteers and the department in which they serve should be kept in the volunteer resources office. A copy of this schedule could be distributed to departments, placed at the switchboard and other areas where it would help in communications and coordination.

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[2] Appendix, pages 19, 20, 21, & 22
[6] Appendix, pages 23 & 24
[7] Appendix, pages 32 & 35

[8] Appendix, pages 33,34, & 35
[9] Appendix, pages 25 & 26

7. <u>Volunteer Identification Card, PW 393</u> <u>10/</u>

At most institutions identification cards are issued to regular volunteers upon completion of the orientation course. The card is used for identification when on duty and serves as an additional form of recognition. The card should be returned at time of resignation.

8. <u>Service Guide for Volunteers, MH/MR-574</u> <u>1/</u>

Service guides are prepared jointly by the using department and the Volunteer Resources Coordinator as an aid to realistic recruitment of volunteers and volunteer groups to fill the institution/facility needs for service.

9. <u>Community Service Confirmation, MH/MR-575</u> <u>11/</u>

This form is used within the institution to facilitate communication regarding group volunteer activity. It also provides for an immediate appraisal after the event.

B. <u>Community Resources</u>

1. <u>Directory of Community Organizations Serving Multiple Institutions</u>

A directory is prepared annually by the Division of Volunteer Resources, of the key State leadership of the community organizations serving multiple institutions. It is distributed to institutions primarily for reference purposes. When a State leader resides in the area served by an institution, there may be an appropriate opportunity for interpretation of the institution program.

2. <u>Record of Resources Provided by the Community</u>

a. <u>Service Record</u>

An individual Record should be maintained on a 5" x 8" card for each community group. The record should include: name of group; name, address and telephone number of contact person; dates and hours of service; type of service, donations and facilities, and date of acknowledgment. The area to which donations were distributed should be recorded.

b. <u>Potential Resources</u>

The data on offers of volunteer service, donations and facilities should be recorded on individual cards for further reference and utilization.

c. <u>Project or Request File</u>

A record should be maintained by suitable breakdown of staff requests in terms of volunteers,

materials and use of facilities. The requesting department should be kept informed of the status of the requests.

d. <u>Donations from Individuals</u>

Similar procedures should be followed for donations from individuals as are maintained for groups.

II. <u>POLICIES AFFECTING VOLUNTEER RESOURCES</u>

A. <u>Procedure Book for Volunteer Resources</u>

A book of the procedures pertaining to volunteer resources administration in the DPW Manual, DPW Bulletin, OCMH, OCMR and OCMH/OCMR Memoranda, and Division of Volunteer Resources Memoranda are provided to the volunteer resources office. It is the responsibility of the volunteer resources office to review copies of additional procedures as sent and to file in the appropriate section. Some of the information should be discussed with other departments or shared with volunteers as appropriate.

<u>Regulations Frequently Utilized Are</u>:

DPW Manual 3210 - Free Meals at Institutions
DPW Manual 8910 - Insurance for Volunteer Workers
 Renewal notice must be sent to the Director,
 DPW Office of Administrative Services, by
 memorandum before May 1 every three years.
DPW Bulletin 426, Supplement 2 - Transporting Patients
DPW Bulletin 641, Supplement 2 - Institution Employes as Volunteers (Payment of Overtime-Institution Employes)
DPW Bulletin 641, Supplement 2, Section IX-D - Employes Volunteered Time
MH/MR-1968-12 - Guide for Service-Junior Volunteers

B. <u>Institution Manual for Volunteer Resources</u>

Purpose: It is recommended that each institution provide a manual or booklet for volunteers which contains pertinent information for their use:

1. <u>Information on Institution</u>

 a. History

 b. Organizational structure

 c. Institution map

 d. Other pertinent information

2. <u>Institution Policies Affecting Volunteers</u>

 a. Attendance - Stress regularity and absences, etc.

<u>10/</u> *Appendix, page 30*
<u>1/</u> *Appendix, pages 17 & 18*
<u>11/</u> *Appendix, pages 36 & 37*

b. Volunteer Dress - The current philosophy is that volunteers in civilian dress are more suitably dressed to fit the purpose of being a friend or a representative from the community. Volunteers should dress appropriately for the job which is being done.

c. Specific Policies Involving Volunteers in Matters of -

      (1) Patient privileges
      (2) Smoking, security and safety precautions
      (3) Confidentiality of information

3.   Bibliography for Volunteers

A list of current and pertinent reading for volunteers should be included to encourage further study.

III. REPORTS

A. Monthly Report - MH/MR-490 12/

As one method of reporting volunteer resources to the superintendent or director, board of trustees, institution staff, regional office staff, Division of Volunteer Resources, Central Office and the community, a monthly statistical and narrative report, MH/MR 490 12/ is required. Periodic analysis of the data reported is useful to note trends in service, quality, quantity and seasonal participation by the community both on a statewide and local basis. This report is also used for compiled information of planned tours of visitors and speaking engagements by staff in the community.

Instructions for the completion and distribution of the report are included in the Appendix 13/ .

The due date for the monthly report in the Division of Volunteer Resources is the fifth working day after the month reported.

B. Valuation of Gifts - MH-114 14/

Information on the Valuation of Gifts report, MH-114, reflects trends and changes of attitudes both on the part of the community and the staff. Information from this report, coupled with Monthly Report, MH/MR 490, provides a more complete picture of total community participation. The resources of material and funds donated by the community are important considerations in program and budgetary planning in addition to State appropriations and canteen funds resources.

The due date for the report, MH-114, in the Division of Volunteer Resources is monthly on the fifth working day after the month reported.

The estimated valuation of gifts is for Staff Use Only. Donors should not be requested to estimate the monetary value of their donations.

C. Annual Report

The due date for the annual report on volunteer resources in the Division of Volunteer Resources is July 15 of each year covering the previous period, July 1 - June 30, following the outline:

    A.   Trends Affecting Volunteer Resources

    B.   Services of Special Significance

    C.   Future Plans

The report should involve long range plans and not duplicate monthly reports. This annual report can aid the superintendent and director in the preparation of the annual institution report. Compilation of all annual reports on volunteer resources is shared with Central Office staff, State mental institutions, and regional office staff.

D. Special Reports

Information on special projects involving community participation are occasionally necessary, at which time special reports are then requested. This may involve participation of community based volunteers, facets of treatment programs, such as admission and transitional planning or of state or national community organizations.

IV. REQUISITIONING FORMS AND INSTRUCTIONS

Volunteer resources forms should be requested as follows:

A. By Internal Stores Requisition, PW-300R

MH/MR 490 - Volunteer Resources Monthly Report (Statistical pages) Consists of 4 numbered pages, which may be ordered separately, if needed

MH/MR 490-3- Volunteer Resources Monthly Report (Tours page)

MH/MR 490-4- Volunteer Resources Monthly Report (Narrative page)

MH/MR 490A15/ Worksheet for MH/MR 490

MH/MR 570 - Application for Regular Individual Volunteer Service

MH/MR 571 - Regular Individual Volunteer Personnel Data

12/ Appendix, pages 41, 42, 43, 44
13/ Appendix, pages 45, 46, 47, 48, 49
14/ Appendix, pages 50, 51, 52
15/ Appendix, pages 38, 39, 40

A. By Internal Stores Requisition, PW 300R (Cont'd.)

MH/MR 572   -   Regular Individual Volunteer
                Service Report

MH/MR 572A -   Group/Entertainers Volunteer
                Service Report

MH/MR 573   -   Regular Individual Volunteer
                Master Service Record

MH/MR 574   -   Service Guide for Volunteers

MH/MR 575   -   Community Service Confirmation

MH 114   -   Valuation of Gifts

MH 115   -   Clothing Donations

B.   By Memorandum to Division of Volunteer
Resources

PW 393   -   Volunteer Identification Card

Instructions for the following forms should be requested by Memorandum to the Division of Volunteer Resources. Instructions for the other forms shown above are printed on the reverse side of the form.

MH/MR 490   -   Instructions
                Includes instructions for the
                MH/MR 490, 490-2, 490-3, and 490-4.

MH/MR 570   -   Instructions

MH/MR 571   -   Instructions

MH/MR 572   -   Instructions

MH/MR 572A -   Instructions

MH/MR 573   -   Instructions

MH 114   -   Instructions

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Volunteer Training and Development, Anne K. Stengel and Helen M. Feeney - Seabury Press, Inc., New York, N.Y. - 1968.

Citizen Boards at Work, Harleigh B. Trecker - Association Press, 291 Broadway, New York, N.Y. - 1970.

Volunteers Today - Finding, Training and Working With Them, Harriet H. Naylor - Association Press, 291 Broadway, New York, N.Y. - 1967.

The Board Members' Manual, Charlotte K. Demorest - National Public Relations Council, New York, N.Y. - 1951.

Using Volunteers in Court Settings, Ivan H. Scheier, Ph.D. - Box 41, Department of Health, Education and Welfare, SRS - 1969.

APPENDIX

SERVICE GUIDE FOR VOLUNTEERS

Name of Department_____

Service Title_____

No. of Volunteers Needed_____

Location of Work_____

Day(s)_____

Hours: From_____To_____

Duties: (Describe the duties of the job, regular and some indication of occasional re-
         sponsibilities. Explain purposes and function in relation to supervising
         department.)

Special Requirements: (Give information on specific skills, personal characteristics
                        needed to perform in the assignment, if any. Give specifics
                        in regard to seasonal needs, physical demands, age, sex and
                        limitations.)

Training: (Indicate type and length of time.)

Supervision By:_____

MH/MR-574 1/68

Service guides jointly prepared by the individual department and the Volunteer Resources Coordinator are essential administrative tools. The importance of periodic review of service guides must be stressed as the needs for services by volunteers may increase, decrease or cease. Service guides should be reviewed whenever there are supervisory changes within a department. There are multiple uses for service guides, such as:

1. Clarification of the job for both the requesting department and the Volunteer Resources Coordinator.

2. Interpretation of job opportunities to volunteer applicants.

3. Recruitment of volunteers.

4. Placement of volunteers.

5. Interpretation to institution staff and community on the role of the volunteer in the institution program and transitional planning for the patient.

6. Information to new staff members on volunteer services.

In a department working with volunteers for the first time, it is wise to start slowly on a pilot project basis. Initial requests for volunteers should take this fact into consideration.

Form MH/MR-574 may be obtained through submission of Internal Stores, PW 300-R.

APPLICATION FOR REGULAR INDIVIDUAL VOLUNTEER SERVICE

1. Mr. LAST NAME   FIRST   MIDDLE INITIAL   HUSBAND'S NAME | 2 BIRTH DATE
   Mrs.
   Miss

3. ADDRESS   ZIP CODE | 4. HOME PHONE   BUSINESS PHONE

5. STUDENT-NAME OF SCHOOL   CAMPUS ADDRESS   ZIP CODE

6. EDUCATION - Show highest grade completed.   ELEMENTARY_____ HIGH SCHOOL_____ COLLEGE_____ DEGREES _____

   MAJOR SUBJECTS

   OTHER (Business, Trade, Nursing, etc.)

7. FOREIGN LANGUAGE(S)   READ   WRITE   SPEAK

8. MAJOR WORK EXPERIENCE - Show type and length of time.

9. VOLUNTEER EXPERIENCE (HOSPITAL, CLINIC, COMMUNITY/CHURCH ORGANIZATIONS) Show type and length of time.

10. LIST MAJOR INTERESTS, HOBBIES, ETC. Include experience and any training.

11. LIST MAJOR COMMUNITY OR OTHER ORGANIZATIONS TO WHICH YOU BELONG.

- -

12. CONSENT FOR JUNIORS 16 - 18 YEARS - To be completed by parent or person responsible.

        I HEREBY GIVE MY CONSENT FOR _____

        TO SERVE AS A VOLUNTEER AT_____

        DATE_____ SIGNED _____

MH/MR - 570 - 1-68

13. DO YOU HAVE DEPENDABLE TRANSPORTATION TO THE INSTITUTION?   YES _____ NO _____

14. SPECIFY ANY HEALTH LIMITATIONS.

IF NECESSARY WOULD YOU BE WILLING TO GET A DOCTOR'S CERTIFICATE?   YES _____ NO _____

15. IN AN EMERGENCY WHOM SHOULD WE NOTIFY?

NAME   RELATIONSHIP

ADDRESS   TELEPHONE

16. AVAILABILITY

TIME	MON.	TUE.	WED.	THU.	FRI.	SAT.	SUN.
MORNING							
AFTERNOON							
EVENING							

Check (✓) for preferred time.
Check (✓✓) for second choice.

How many hours can you serve regularly each week? _____

Show time of year when you will be unavailable. _____

DATE _____   SIGNED _____

Application for Regular Individual Volunteer Service, MH/MR-570

Following the practices of good business administration, separate forms are used for the application and personnel record for regular individual volunteers. Each form has a unique function.

The Application for Regular Individual Volunteer Service, MH/MR-570 serves as a declaration of interest and intent to become a volunteer. The applicant states his qualifications in his own words and in so doing he is likely to have a feeling of commitment as a volunteer.

Instructions for Completing Application, MH/MR-570

The instructions below are a guide for the interviewer who assists the applicant. Essential information is recorded. Any special details are elicited from the applicant at the time of the interview.

If more space is needed the blank area on the reverse of the application may be used. The factor is identified by its corresponding title and number.

The same form is used for adult, junior and college student volunteers. Juniors and college students are designated by a check mark in the appropriate space in the upper right hand corner.

(1-4) Self-explanatory

(5) College students - show name and address of school which they are attending.

(6) Education - Enter only the highest grade achieved. College students and graduates show major subjects. Under "Other" include any specialized training such as trade and vocational schools, nursing, barbering, beauty culture or other specialized schools.

(7) Foreign Languages - The applicant indicates any foreign languages which he is able to read, write or speak.

(8) Work Experience - Describe only paid work experience.

(9) Volunteer Experience - Include volunteer work in clubs, community agencies, school and church organizations, hospitals, clinics, etc.

(10) Major Interests, Hobbies - The interviewer assists the applicant in bringing out related experiences which may be helpful in volunteer work. Included are all activities involving working with people in such areas as arts and crafts, cooking, current events, dancing, discussion leader, dramatics, dressmaking or sewing, participation in individual and group games, card games, chess, grooming, homemaking, library work, newspaper work, office work, photography, services for individual patients, sports, story telling, teaching, writing, etc.

(11) **Community and Other Organizations** - Include membership in civic, religious, special interest groups, youth, business, veterans, service and professional organizations. Enter any responsible offices held.

(12) **Consent for Juniors 16-18 years** - If the applicant is between 16-18 years of age, a parent or person in loco parentis must indicate his approval by completing this section. After the application is no longer of any use, this approval may be detached and retained for future use.

(13) **Transportation** - The method of transportation in relation to the commitment is explored. Information should be obtained regarding liability insurance carried by car owners whose cars are used in volunteer work.

(14) **Health Limitations** - The applicant may not reveal or may be unaware of health limitations which may affect placement or usefulness as a volunteer. The interviewer makes a clear-cut determination as to possible health hazards and requests a doctor's certificate if needed.

(15-16) **Self-explanatory**

REGULAR INDIVIDUAL VOLUNTEER PERSONNEL DATA   JUNIOR _____ COLLEGE _____

1. MR.   LAST NAME   FIRST   MIDDLE INITIAL   HUSBAND'S NAME | 2. BIRTH DATE
   MRS.
   MISS

3. ADDRESS   ZIP CODE | 4. HOME PHONE   BUSINESS PHONE

5. STUDENT-NAME OF SCHOOL   CAMPUS ADDRESS   ZIP CODE

6. EDUCATION   ELEM. ____ H.S. ____ COLL. ____ DEGREE _____ MAJORS

   OTHER

7. FOREIGN LANGUAGE(S)   READ   WRITE   SPEAK

8. WORK EXPERIENCE

9. VOLUNTEER EXPERIENCE

10. MAJOR INTERESTS, HOBBIES, ETC.

11. CLUBS, ORGANIZATIONS

12. TRANSPORTATION

13. HEALTH LIMITATIONS

14. IN EMERGENCY NOTIFY

15. CONSENT FOR JUNIORS

MH/MR-571 - 1-68

16. COMMENTS RELATING TO EVALUATION OF SERVICE, SPECIAL SKILLS OR PERTINENT INFORMATION NOT RECORDED ELSE-
    WHERE.

Regular Individual Volunteer Personnel Data, MH/MR-571

The Regular Individual Volunteer Personnel Data, Form MH/MR-571, is a permanent personnel history card. After the volunteer completes the Orientation Course and receives his assignment, the Volunteer Resources Office extracts the desired information from the Application and records it in a condensed form on the Volunteer Personnel Data card. The format and content parallel that of the Application intentionally in order to facilitate the transfer of pertinent information.

Evaluative comments relating to service, important reassignments, referrals to other hospitals, special leave of absence, etc., are noted on the reverse. Such comments are useful in many ways but are particularly valuable when references are requested. No provision is made for recording assignments since these may be diversified or subject to change thus requiring up-dating.

After the information is recorded on the MH/MR-571, the application need not be retained. What the applicant has recorded in his own words is not as important as the shortened version entered on the permanent record by the Volunteer Resources Office. However, for recruiting purposes it may be advisable to keep those applications from promising candidates, who, for valid reasons are unable to complete the Orientation Course or are not available for placement at that time.

Instructions for Completing Personnel Data Card, MH/MR-571

The same form is used for all volunteers. Juniors and College Students are designated by a check mark in the appropriate space in the upper right hand corner.

The instructions for completion of the Application, MH/MR-570 also apply to the corresponding factors on the MH/MR-571. The reverse of the card is for the exclusive use of the Volunteer Resources Coordinator for recording information of value in volunteer administration as described in the second paragraph above.

Instructions for Maintenance of Personnel Data File

The Personnel Data cards are kept in a 5" x 8" desk file which is divided into four major sections separated by appropriately labelled file guides These sections are:

(1) Regular Adult Volunteers
(2) Junior Volunteers
(3) College Student Volunteers
(4) Inactive Volunteers

Cards are filed alphabetically within each category. When the status of a volunteer changes from active to inactive the card is filed alphabetically in the Inactive section without regard to the type of volunteer.

REGULAR INDIVIDUAL VOLUNTEER MASTER SERVICE RECORD

JUNIOR _____ COLLEGE _____

| Mr. Mrs. Miss | LAST NAME | FIRST | MIDDLE INITIAL | ADDRESS | ZIP CODE |

Cumulative Total Hours	Year 19 to 19	Total Hours	Cumulative Total Hours	Year 19 to 19	Total Hours	Cumulative Total Hours	Year 19 to 19	Total Hours

MONTH	DEPARTMENT(S)	HOURS	MONTH	DEPARTMENT(S)	HOURS	MONTH	DEPARTMENT(S)	HOURS

LEAVE OF ABSENCE - RESIGNATION

Date Begin	Leave Resign.	Reason	Date Return	Date Begin	Leave Resign.	Reason	Date Return	Date Begin	Leave Resign.	Reason	Date Return

MH/MR-573 - 4-69

| Mr. Mrs. Miss | LAST NAME | FIRST | MIDDLE INITIAL | | |

JUNIOR _____ COLLEGE _____

Cumulative Total Hours	Year 19 to 19	Total Hours	Cumulative Total Hours	Year 19 to 19	Total Hours	Cumulative Total Hours	Year 19 to 19	Total Hours

MONTH	DEPARTMENT(S)	HOURS	MONTH	DEPARTMENT(S)	HOURS	MONTH	DEPARTMENT(S)	HOURS

LEAVE OF ABSENCE - RESIGNATION

Date Begin	Leave Resign.	Reason	Date Return	Date Begin	Leave Resign.	Reason	Date Return	Date Begin	Leave Resign.	Reason	Date Return

ORIENTATION DATE _____   RECOGNITION PIN DATE _____   REFRESHER COURSE DATE _____

Regular Individual Volunteer Master Service Record, MH/MR-573

        The Regular Individual Volunteer Master Service Record, MH/MR-573 is a six year record of hours served, leave taken, training and recognition given. It also provides data for monthly reporting. The same form is used for all regular individual volunteers.

A. Instructions for Preparation of the Service Record Section, MH/MR-573

        The informational source is the volunteer's own record of hours served as shown on the sign-in sheets. The card provides a section for each yearly period of service, the totals for the year appearing at the top of the section. Hours of service are posted monthly and summarized annually.

        The following instructions apply to the initial preparation of the Service Record and define the entries to be made.

1. Junior or College - Identify junior and college student by a check mark in the appropriate space.

2. Cumulative Total Hours - If there is a record of previous service enter the total number of hours in the first block under the last name; otherwise enter a zero. The Cumulative Total for succeeding entries will be the Total Hours for the preceding 12 month period plus the Cumulative Total.

3. Year 19-- to 19-- - Enter the last two digits for the year(s) covered by the 12 month period.

4. Total Hours - At the end of each 12 month period, enter the total number of hours served during that period.

5. Month - Enter the month which is being reported.

6. Department(s) - On one line, enter the names of all Departments which provided supervision of the volunteer during the month. Customary abbreviations may be used to denote the Departments.

    Only a few samples of typical services performed by Departments are listed below. However, similar services frequently are performed in more than one Department.

    Administration - Receptionist at information desk, assisting in office.
    Chaplaincy - Sunday school teacher, escort to religious services.
    Education - Academic instruction, teacher assistant.
    Food Service - Encouraging and training patients to eat. Decorating in dining areas.
    Medical - Assisting in group therapy or special projects supervised by psychiatrist.

Nursing - Service to patients in ward situation, including feeding patients, clothing shop.
Occupational Therapy - Assisting in instruction of patients in crafts and other occupational therapy.
Psychology - Assisting in rehabilitation programs, research projects.
Recreation - Assisting in music, sports, social recreation.
Social Service - Assisting in office, escorting patients to job interview, home placement, or shopping trip in community.
Vocational Adjustment Services - Assisting in instruction, follow-up and evaluation of individual patients in work assignments.
Volunteer Resources - Assisting in office or special projects and services directly supervised by the volunteer resources coordinator.
Library - Under supervision of staff librarian, assisting in library, book cart service, or conducting book review clubs or discussion groups.
Physical Therapy - Escorting patients to physical therapy clinic or visiting with patients awaiting treatment.
Speech Therapy - Instruction in speech, escorting patients to speech clinic, audiometric testing.
Vocational Rehabilitation - Assisting patients in job preparation related to application and interview.
Other - Record services which do not fit into any of the above categories.

7. Hours - Enter the total number of hours served during the month.

B. Instructions for Preparation of Leave - Resignation Section, MH/MR-573

Regular volunteers who are absent from service from one to no more than twelve months are considered on leave of absence.

1. Date Begin - Date Return - Enter Dates.

2. Leave - Resignation - Designate type by one of the following codes,
    L - Leave
    R - Resignation
    T - Transfer

3. Reason - Enter the reason such as education, employment, illness, leaving the area, pregnancy, transfer, vacation, other (describe briefly)

C. Instructions for Maintenance and Use of Service Record File

1. File Arrangement - The Service Record is also kept in a 5" x 8" desk file divided into these sub-divisions:

Active File
    1. Volunteers, Beginning of Month
    2. New Placements
    3. Reinstated
        a. From Leave
        b. From Resignation
    4. Placed on Leave
    5. Resigned
        a. From Active Status
        b. From Leave Status

<u>Inactive File</u>
  1. On Leave
  2. Resigned

2. Maintenance – A Master Service Record, MH/MR-573, is prepared for each regular adult, junior and college volunteer. Cards are filed alphabetically without regard to type of volunteer.

To facilitate monthly reporting the file subdivisions correspond to the volunteer's active or inactive status. Changes in status are recorded as they occur and the card is refiled in the appropriate section.

The names of the supervising departments and the areas served are posted monthly. At the end of each 12 month period the total number of hours served is computed and entered.

Dates for Orientation, Recognition Pin and Refresher Courses are recorded as these activities take place.

3. <u>Use of Master Service Record to Prepare the Volunteer Resources Monthly Report, MH/MR-490</u> – It is necessary for the Volunteer Office to establish a system for collecting and recording data on the Service Card which will coincide with the preparation of the Monthly Report.

When preparing the Monthly Report, the section on the Movement of Regular Individual Volunteers on the first page and the section on the Reasons for Resignations and Leave on the second page are prepared <u>before</u> totalling and posting the hours of service on the Service Record. Since the order of the Master Service Record file parallels the factors relating to the Movement of Volunteers it is necessary only to count the cards in each Section of the Active File and Section 1 of the Inactive File, record the count in the corresponding section of the MH/MR-490 and compute any totals needed. Sections 4 and 5 of the Active File are used to determine the number of volunteers involved and the reasons for Resignations and Leaves of Absence which are recorded on the second page of the Monthly Report, MH/MR-490.

After the card count, the cards are refiled to reduce the number of categories from 9 to 3 and thus simplify the posting of hours served. The cards in Sections 1, 2 and 3 of the Active file are merged alphabetically and refiled in Section 1. Cards in Sections 4 and 5 are merged with the corresponding cards in Sections 1 and 2 in the Inactive file.

After the Master Service Record Cards are refiled, the Departments and hours served are posted to the Service Card, and remaining items on the MH/MR-490 are completed.

The following is a suggested curriculum and faculty for an orientation course for regular individual volunteers. It should be a minimum of 12 hours in length. Order of subject matter and length of sessions should suit the needs of the individual institutions.

Suggested Course Content	Suggested Faculty

I. The Institution/Facility Community   Superintendent

    Welcome to the group
    Function of institution/facility
      re: patient
      re: community
    Brief history
    Relationship to State Department of Public Welfare
    Administration
      Eligibility for treatment
      Method of patient admission and discharge
      Patients' privileges
    Volunteer in relation to institution and community:
      Confidential aspects of information

II. Mental Illness/Retardation   Clinical Director

    Interpretation of mental illness/retardation
    Understanding the patient and his behavior
    Modern treatment methods
    Misconceptions and fears

III. Nursing Services

    Function of nursing service   Director of Nursing or
    Changing concepts in nursing care   Director of Nursing Education
    Role of attendant
    Developing effective patient relationship
    Approach and attitude towards patients
    Role of volunteer in nursing care program

IV. Staff Relationship to the Patient   Department Representative

    Overview of the functions and teamwork of the individual departments in the treatment of patients.
    The departments which have requested volunteer services should be included along with others which will aid volunteers in acquiring a concept of the total treatment program.
    How the volunteer fits into the above should be described.

V. Volunteer Resources   Volunteer Resources Coordinator

    Structure of volunteer services within institution
    Role of volunteer in-   Volunteer Panel
      institution
      relationship to volunteer resources coordinator
      relationship to patient

Standards for Volunteer Resources:
  Personnel procedures-
  Training
Discussion period - to clarify, tie-up and summarize the course content

The above content may be divided into several sessions throughout the course. When there is a chairman of volunteers or experienced volunteer, certain aspects of the sessions on volunteer resources may be chaired by volunteers, using panel or role playing techniques. Other experienced volunteers may assist with registration, tours, coffee hours and the initial assignments.

VI. Visual Material

A manual or printed kit may be prepared in advance for distribution at the beginning of the course. The manual may include:

a map of the institution, showing areas which are important to the volunteer;
institution table of organization;
mimeographed data on general institution information;
information on various department services;
institution regulations affecting volunteer resources.

Selected films borrowed from OMH Educational Materials Office or from local community resources may be scheduled. Pre and post discussion on films should be planned related to the individual institution situation.

Individual conferences for placement of volunteers should be planned at the close of the course.

Initial assignments within departments under the immediate supervision of a staff worker should be arranged.

VOLUNTEER IDENTIFICATION CARD

COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF PUBLIC WELFARE

NAME OF DPW PROGRAM:

NAME OF VOLUNTEER:

VOLUNTEER IDENTIFICATION CARD

SIGNATURE OF VOLUNTEER:

IS A REGULAR VOLUNTEER AT THIS PROGRAM

DATE   AUTHORIZED STAFF MEMBER

                        TITLE

(CARD TO BE RETURNED UPON RESIGNATION/RETIREMENT FROM VOLUNTEER ASSIGNMENT)

PW 393- 4-70

PROCEDURE FOR REQUISITIONING VOLUNTEER RECOGNITION PINS

VOLUNTEER RECOGNITION PIN

I. Initial Requisition of Recognition Pins

A Purchase Requisition No. OA-173 should be processed to the Bureau of Procurement in the usual procedure. The requisition should include request for both, die, which will be retained by the individual institution, and the number of recognition pins desired. It will be necessary to submit with the initial request one copy, 2-1/4" in diameter, prepared at the institution, of the design of the pin. The description of the pin is as follows:

    1. Material - sterling silver with gold wash

    2. Size - 3/4 inch

    3. Styling -

        A. Medium blue enameled
        B. Lettering in gold -
            Name of institution, such as Allentown
            State Hospital, engraved on rim of pin.
            The word Volunteer engraved on Key-
            stone.

    4. Small loop on back lower left hand corner for guard.
       (Guards are not being ordered at this time.)

    5. Good quality, material and workmanship.

II. Reorder of Pins

If the total purchase value of the reorder request is less than $100, a Field Limited Purchase Order, Form OA-182, should be processed as described in the revised section 6135 of the DPW Manual. This applies only where the die for the pin has already been provided and used. Each institution will be responsible for securing bids from three or more bidders if the reorder request is less than $100. A sketch of the pin, as described above, must be submitted to each bidder as well as a statement that the die will be furnished to the successful bidder.

REGULAR INDIVIDUAL VOLUNTEER SERVICE REPORT

NAME OF VOLUNTEER

SUPERVISING DEPARTMENT

DATE	FROM	TO	NO. OF HOURS

MH/MR 572 - 6-68

GROUP/ENTERTAINERS VOLUNTEER SERVICE REPORT

NAME OF GROUP

GROUP CHAIRMAN/LEADER

DATE	FROM TO	NO. HOURS	NO. VOLS.

SUPERVISING DEPARTMENT

NAME	ADDRESS
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	

THE REVERSE MAY BE USED FOR ADDITIONAL NAMES AND FOR THE NAMES
AND ADDRESSES OF PROSPECTIVE VOLUNTEERS. PLEASE RETURN THIS FORM
TO THE SUPERVISING STAFF MEMBER.

MH/MR 572 A - 6-68

	NAME	ADDRESS
17.		
18.		
19.		
20.		
21.		
22.		
23.		
24.		
25.		
26.		
27.		
28.		
29.		
30.		

PROSPECTIVE VOLUNTEERS

NAME	ADDRESS

Instructions for Individual and Group Service Reports

1. Regular Individual Volunteer Service Report MH/MR 572

This is a sign-in form to be used by regular, individual volunteers for reporting hours of service. It provides the basic information for the Master Service Record, MH/MR 573 and for the Volunteer Resources Monthly Report, MH/MR 490.

A supply of the forms and a suitable receptacle in which to deposit completed forms are placed wherever it is most convenient for volunteers to sign in and out. Volunteers who work away from the institution may be given a supply of forms which may be mailed in.

At the end of each period of service the volunteer records his/her name, the name of the supervising department in which the service was given, the date, the time and the number of hours served. If a volunteer serves in more than one department, a separate form is used for each department in which the volunteer worked. Since the form has space for 5 entries, one form may be used to record the hours served for the entire month or a separate form may be used for each week. Completed forms are deposited in the receptacle provided. At the end of each week or month, whichever is preferred, the accumulated forms are sent to the Volunteer Resources Office for tabulation and reporting.

After the Master Service Record is posted and the Monthly Report has been prepared, the Service Record need not be retained. However, in the case of an accident involving an insurance claim, the Service Record should be kept until a settlement is reached because it is the only record of the exact day and time when a volunteer worked.

2. Group/Entertainers Volunteer Service Report MH/MR 572A

This is a sign-in form for group volunteers and for entertainers, and furnishes basic information on hours of service. It is useful for recruitment since it provides for listing the name and addresses of any pro spective volunteers.

At the end of each period of service, the Group Chairman or Leader completes the identifying information, date, time, number of hours served and the number of volunteers who participated. The volunteers sign and enter their addresses. The completed form is turned in with the Community Service Confirmation, MH/MR 575 to the Volunteer Resources Office for processing.

COMMUNITY SERVICE CONFIRMATION   Date_____

To:_____

From: Volunteer Resources Office_____

Type Service_____

Date_____Time: From_____ To_____ Place_____

Group Reports To: Staff Member_____

                   Department_____

                   Meeting Place_____

Name of Organization_____ Location_____

Contact Person   _____ Telephone_____

Address_____

No. Participating: Volunteers_____Patients_____Wards_____

Special Instructions

Copies To:

                              Comments

Signature_____ Title_____Date_____

Signature_____ Title_____Date_____

                                                      MH/MR 575   6-68

                              - 36 -

The Community Service Confirmation, form MH/MR 575, is used within the institution to confirm arrangements made with volunteer groups and entertainers and to evaluate the effectiveness of the service given. Generally, the confirmation to group representatives will be done by letter. In exceptional cases, the form may be used for groups and only if the relationship with the group is such that this would be both practical and advisable.

The coordination of service begins with (a) the specific request which is usually initiated by a department by means of the Service Guide, form MH/MR 574 or (b) it may also be initiated upon receipt of an offer of service by a group. The Volunteer Resources Coordinator works with the supervising department and the group representative to explore the range of the requested services in relation to the potential resources of the group. The supervising department will plan the details of the program with the group. A realistic appraisal is made immediately after the event has taken place. This appraisal provides essential feedback to the Coordinator from the institutional staff and the Community representative.

Preparation of the Form

Date - Use the date the form is prepared.

To - Enter the name of the department and the staff member to whom addressed.

From - Enter the name of the Volunteer Resources Coordinator.

Type of Service - Show the kind of service as a party, concert, entertainment, special services for patients etc.

Date - Show the date of the event and, if needed, a rain date.

Time - Include the time of the group's arrival and departure.

Place- Show where the event is to take place.

Group Reports To - Show the mame of the supervising staff member and the department, the place where the group is to meet and any directions needed for getting there.

Name of Organization - Enter the name of the sponsoring group.

Location - Enter the name of the town, city or sub-division where the group is located.

Contact Person - Show the name, telephone number and address of the person representing the group.

No. Participating - Enter the number of volunteers, patients and/or the number of wards.

Special Instructions - Include any additional pertinent details which are not covered above.

Copies To - Provide a sufficient number of copies for effective communication.

Comments - This section is completed immediately after the event has taken place and returned to the Volunteer Resources Coordinator. The supervising staff member and the volunteer group representative record brief comments including any constructive suggestions and patient response if such is indicated. These evaluative comments will be equally useful in (1) future program planning, (2) redirection of commitment to appropriate area of need and (3) written acknowledgment of services.

Signature, Title and Date - The person who comments signs and records his title and date.

LINE NUMBER	ADMINISTRATION	CHAPLAINCY	EDUCATION	FOOD SERVICE	MEDICAL	NURSING	OCCUPATIONAL THERAPY	PSYCHOLOGY	RECREATION	SOCIAL SERVICE	VOCATIONAL ADJUSTMENT SERV	VOCATIONAL REHABILITATION	VOLUNTEER RESOURCES	LIBRARY	OTHER PHYSICAL THERAPY	OTHER SPEECH & HEARING	OTHER	OTHER	OTHER
1.																			
2.																			
3.																			
4.																			
5.																			
6.																			
7.																			
8.																			
9.																			
10.																			
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29.																			
30.																			
31.																			
32.																			
33.																			
34.																			
35.																			
36.																			
TOTAL HOURS																			

WORKSHEET FOR MH/MR 490

MH-490 A - 6-68

REASONS FOR LEAVE OF ABSENCE OR RESIGNATION

REASON	LEAVE (Number)	RESIGNATION (Number)
Dissatisfaction		
Education		
Employment		
Illness		
Leaving Area		
Pregnancy		
Transfer		
Vacation		
Other (Specify)		

INSTRUCTIONS

Worksheet for MH/MR-490, MH/MR 490A

The Worksheet is used in the preparation of the Volunteer Resources Monthly Report MH/MR 490, to accumulate the number of hours served by each volunteer in each department and the information pertaining to leave and resignations. Although the Worksheet is not used to obtain the total number of different regular volunteers who have served, this total can be obtained if additional assignments are suitably marked.

The Worksheet has a column for each department shown on the MH/MR 490 and spaces to add others not shown. Each column contains 36 blocks for recording the total number of hours served by volunteers up to a total of 36 volunteers. The blocks are filled in consecutively, one block for one volunteer. If a volunteer worked in more than one area, a separate entry is made showing the total number of hours worked in each department. Additional Worksheets may be used as needed.

The Line Number shows at a glance the total number of volunteers serving each department. The Line Number corresponding with the last entry in any column is the total number of volunteers who served in that department. For example, if the last entry in the column is on Line 10, this means that there were 10 volunteers who served in that department. The entries in each column are added to obtain the total number of hours served in that department and this total is recorded at the bottom of the column.

Information regarding the number of volunteers who are placed on leave or who have resigned and the reasons is obtained from the Regular Individual Master Service Record, MH/MR 573, and tallied on the Reverse of the Worksheet.

VOLUNTEER RESOURCES MONTHLY REPORT

INSTITUTION	
MONTH	YEAR

SUPERVISING DEPARTMENT	REGULAR INDIVIDUAL		GROUP/OCCASIONAL		TOTAL	
	Volunteers	Hours	Volunteers	Hours	Volunteers	Hours
Administration						
Chaplaincy						
Education						
Medical						
Nursing						
Occupational Therapy						
Psychology						
Recreation						
Social Service						
Speech & Hearing						
Team						
Vocational Adjustment Services						
Volunteer Resources						
Other (Specify on Reverse)						
Total *						
Entertainers and Specialists _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _						

MOVEMENT OF REGULAR INDIVIDUAL VOLUNTEERS

1. Volunteers, beginning of month - Total (2 and 3) _ _ _ _ _ _ _ _ _ _ _ _ ─────
   2. Active Status _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ─────
   3. On Leave Status _ _ _ _ _ _ _ _ _ _ _ _ _ _ ─────
4. New Placements _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ ─────
5. Reinstated - Total (6 and 7) _ _ _ _ _ _ _ _ _ _ _ _ _ _ ─────
   6. From Leave Status _ _ _ _ _ _ _ _ _ _ _ _ _ ─────
   7. From Resignation _ _ _ _ _ _ _ _ _ _ _ _ _ ─────
8. Placed on Leave Status _ _ _ _ _ _ _ _ _ _ _ _ _ _ ─────
9. Resigned - Total (10 and 11) _ _ _ _ _ _ _ _ _ _ _ _ _ _ ─────
   10. From Active Status _ _ _ _ _ _ _ _ _ _ _ _ _ ─────
   11. From Leave Status _ _ _ _ _ _ _ _ _ _ _ _ ─────
12. Volunteers, End of Month - Total (13 and 14) _ _ _ _ _ _ _ _ _ ─────
   13. Active Status (Sum of 2, 4, and 5 Minus Sum of 8 and 10) _ _ ─────
   14. On Leave Status (Sum of 3 and 8 Less Sum of 6 and 11) _ _ ─────

* NOTE
    Enter here total number of different regular individual volunteers who served during this month. This total is not necessarily the sum of individual items above because of multiple assignments.

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"OTHER"

SUPERVISING DEPARTMENTS	REGULAR INDIVIDUAL		GROUP/OCCASIONAL	
	Volunteers	Hours	Volunteers	Hours
Food Service				
Library				
Physical Therapy				
Vocational Rehabilitation				
Total				

JUNIOR - COLLEGE VOLUNTEERS

SUPERVISING DEPARTMENTS	REGULAR INDIVIDUAL				GROUP/OCCASIONAL				TOTAL			
	Volunteers		Hours		Volunteers		Hours		Volunteers		Hours	
	J	C	J	C	J	C	J	C	J	C	J	C
Total*												

* See Note on other side

CLINICS AND DAY TREATMENT CENTERS

Clinics/Centers	Regular	Individual
	Volunteers	Hours
Psychiatric		
Medical		

REASONS FOR RESIGNATIONS OR LEAVES

Reasons	Number on Leave	Number Resigned
Dissatisfied		
Education *		
Employment *		
Illness		
Leaving Area		
Other Responsibilities		
Program Change		
Vacation		
Other (Specify)		
Total		
* Amplify if in Health and Welfare Fields		

TRAINING FOR VOLUNTEERS

	Orientation Course (Attach Agenda)	Refresher Course (Attach Agenda)	On-Job Training	
			Department/Team	Number Volunteers
Dates-Current Month				
Volunteers Attending				
Total Hours Required for Course				
Dates-Projected Plans				

PARTICIPATION BY VOLUNTEER RESOURCES IN INSTITUTION MEETINGS

Department/Staff/Team	Purpose	Department/Staff/Team	Purpose

PARTICIPATION BY INSTITUTION PERSONNEL WITH COMMUNITY GROUPS

Community Group (Full Name)	Staff Member	Department	Location	Type Participation	Primary Purpose

NUMBER OF TOURS AND VISITORS AT INSTITUTION

	STUDENTS			ORGANIZATIONS		OTHER		TOTAL
	High School	College	Other	Community	Professional	Professional	Lay	
Tours								
Visitors								

Continue on reverse side if additional space is required for any of above

NARRATIVE REPORT

Report each month selectively and succinctly information related to administration of volunteer resources. Exclude information previously reported in the report or in the valuation of gifts report. (See Instructions - Page 5)

ATTACHMENTS (Identify each with Institution Name and Date (Check Below))

☐ Staff Planning Committee Minutes   ☐ Orientation Course

☐ Patient and/or Employe Newsletter   ☐ Newspaper Clippings

☐ Volunteer Newsletter   ☐ Photographs

☐ Other

PREPARED BY   DATE

MH/MR 490-4 - 5.70

The report forms are designed to provide pertinent facts concerning volunteer resources to the superintendent, board of trustees, institution staff and community at the local level and to the Division of Volunteer Resources and other appropriate personnel at the State level. The forms are to be completed in quintuplicate to provide one copy to the superintendent, one copy to regional office staff, two copies to the Division of Volunteer Resources at the State office, and the fifth copy for retention in the Volunteer Resources Department file.

The report is due in the Division of Volunteer Resources on the fifth working day following the month being reported. After processing in this division, the statistical reports will be forwarded promptly to the DPW Office of Planning and Research for compilation. Reports will be published on a quarterly basis and forwarded to superintendents for distribution to appropriate departments and boards of trustees.

Statistical Report

The purpose of the report is to record the number and the hours of service of the volunteers who serve and/or are based within the institution. The report is focused on the integration of volunteers into the various institution departments/and teams and not on the activities in which the volunteers participate.

This report does not attempt to record statistically the individual volunteers or organizations who provide services/resources in the community even though the Volunteer Resources staff coordinates them for the institution program. Community based volunteer services are recorded in the narrative section of the monthly report, as appropriate, and on the Annual Community Organization Summary.

The number of volunteers who served during the month and their hours of service, including Junior and College volunteers, should be recorded on page one under the supervising department/team to which assigned. If volunteers have multi-assignments, include under each department/team served. For all departments not listed on page one, enter the total volunteers and hours under 'Other' and specify departments on page two. Convert fractions to nearest whole number.

Regular individual volunteers who do not serve within a given month should be placed on Leave of Absence. Persons who anticipate absence from service one (1) month to no more than twelve (12) months should be placed on Leave of Absence the first month they do not serve.

Regular individual volunteers may be reinstated from resignation within a two-year period.

Hours are not counted during the orientation courses. As the orientation course is still a device for mutual screening, both on the part of the individual and the institution, it would not be practical to include the individuals statistically until placement. Hours are counted for refresher and on-job training sessions.

Definition of Items and Reporting Procedures

Regular Individual - Requirements are: 1) completion of the orientation course for volunteers, 2) commitment to serve regularly at least twice monthly, within the institution or emanating from it, and 3) placement in department(s) or team requesting regular individual volunteers. The individual volunteer may be a junior (16 years minimum age), college student, adult man or woman. Chairmem of groups who provide frequent service should meet the above requirements.

Hours of service by regular volunteers for assignments in addition to regular placement should be recorded.

Individual volunteers may serve provisionally, if they meet the other requirements, with the understanding that they will complete the next orientation course. Reinstated volunteers should be encouraged to take the orientation course as a refresher course.

Team - The organization structure of some institutions provide for multi-departmental treatment programs with focus on individual patients such as units which may be on a geographical, program or building basis. Volunteers who are assigned and trained to work with these programs with multi-departmental supervision would be reported under 'Team'. Coordinated planning for the volunteers is required with designation of a specific staff member to whom to report for guidance and feedback.

Group and Occasional Volunteers - Individuals, who do not meet the regular volunteer criteria and serve only occasionally or for short duration, and groups of volunteers who serve in patient participation programs are reported in this category. An abbreviated or special orientation should be provided for these volunteers, arranged by the supervising department and volunteer resources.

Record under the appropriate department the total number of individuals who serve in groups and as occasional volunteers and the total number of hours served by each member of the group. Work campers or school weekend volunteers may be reported under 'Other' if they serve with several departments.

Example:	Group Volunteers	Hours
1 Garden Club of 12 volunteers worked with patients on flower arrangements and served 1½ hours	12	18
1 Girl Scout Troop of 15 volunteers provided a party and served two hours	15	30
1 former regular individual volunteer served at unit/building picnic	1	6
	28	54

Entertainers and Specialists - The members of groups and individuals, whose assignments have minimal patient contact, and who serve for mass or spectator type programs or in a consultative capacity, are reported in this category. These volunteers include groups such as bands, ball teams, stage shows, refreshment groups; individual entertainers such as magician or accordionist; and specialists such as interior decorator or landscape architect. Volunteers in this category should be briefed prior to their service.

<u>Totals</u>

        <u>Vertical</u> – Add total number of regular individual volunteers and total number of group volunteers for each department/team and enter in the 'total' column. The same applies for 'total' hours.

        <u>Horizontal</u> – Record the total number of different regular individual volunteers, which would not be the sum of the first column if volunteers have assignments to more than one department/team. Add total different regular individual to total group/occasional volunteers and enter in the 'total' column. Add total hours and enter in 'total' column.

        <u>Movement of Regular Individual Volunteers</u> – Record the number of volunteers (if none, enter '0') as follows:

1.   <u>Total carried over at beginning of month</u> – (items 2 and 3) – brought forward from previous month. Same as item 12 of previous month.

2.   <u>Active status at beginning of month</u> – brought forward from previous month. Same as item 13 of previous month.

3.   <u>On leave status at beginning of month</u> – on leave status at end of previous month. Same as item 14 of previous month.

4.   <u>New placements</u> – served this month following orientation, not previously assigned, or served provisionally pending completion of orientation.

5.   <u>Reinstated</u> – total – (items 6 and 7)

6.   <u>From leave</u> – reinstated this month following absence of no more than 12 months.

7.   <u>From resignation</u> – reinstated experienced volunteers who resigned within previous two-year period.

8.   <u>Placed on leave status this month</u> – did not serve this month. Anticipate absence of 1 to 12 months.

9.   <u>Resigned</u> – total (items 10 and 11)

10. <u>From active status</u> – reported in item 2 who terminated commitment this month.

11. <u>From leave status</u> – reported in item 3 who terminated commitment this month.

12. <u>Total end of this month</u> – (items 13 and 14)

13. <u>Active status</u> – (sum of items 2, 4 and 5 minus sum of items 8 and 10)

14. <u>On leave status</u> – (sum of items 3 and 8 minus sum of items 6 and 11)

        <u>Junior and College Volunteers</u> – The service of junior and college volunteers, which is reported on page one, should be recorded on page two under the supervising department so that the factual information will be available at both the institution and the State level of the involvement of youth in the treatment program. This information is useful not only in relation to direct service but in career recruitment.

<u>Clinics and Day Treatment Centers</u> - Record the number of regular individual volunteers and their hours of service in clinics and day treatment centers in order to provide accurate knowledge of the volunteer participation in these programs.

<u>Reasons for Resignations and Leaves</u> - Record the number of regular individual volunteers who resigned or were placed on leave of absence this month beside the appropriate reason. Amplify at bottom of page the number of resignations or leaves of absence for State employment or education in the Health and Welfare fields, noting the specialization.

<u>Training for Volunteers</u>
<u>Orientation and Refresher Courses</u> - Record the dates scheduled orientation courses for new volunteers and refresher courses for experienced volunteers were given during the current month, the number of volunteers who attended and the total number of hours required for the courses. Record the dates of projected plans for these courses in subsequent months.
<u>On-Job Training</u> - Record the planned training workshops or sessions for volunteers given by the various departments or teams. Include attendance at staff training sessions. Hours of attendance should be included in number of hours served by volunteers.

<u>Participation by Volunteer Resources in Institution Meetings</u> - Record any meetings attended with institution staff and their purpose in which there is a potential for interpretation or discussion of volunteer resources, such as affiliate nursing students, staff meetings of individual departments, orientation courses for new staff and staff planning committee on volunteer resources. If there is a multiplicity of meetings of the same type, summarize under the category and indicate total number in parenthesis, such as: Team (10).

<u>Participation by Institution Personnel with Community Groups</u> - Record meetings at the institution or in the community at which a staff member, including the Volunteer Resources staff, <u>represented</u> the institution as a speaker, panel member, resource person or planning participant. Indicate the <u>primary purpose</u> of participation such as planning, education, recruitment, career opportunities, manpower or departmental specialization. Participation of staff as members of community organizations should be excluded.

<u>Tours of Visitors at Institution</u> - Record the number of planned tours of the institution and the number of visitors under the appropriate category which were conducted by the various departments.

Example:

<u>STUDENTS</u>
    High School   - School classes, youth organizations
    College   - College classes, fraternities, sororities
    Other   - Nursing, business, medical assistants
<u>ORGANIZATIONS</u>
    Community   - Adult civic, service, religious, veterans,
                    fraternal
    Professional - Medical, nursing, teachers, dietitians
<u>OTHER</u>
    Professional - College faculty, institution or agency staff,
                    Visiting Nurses Association
    Lay   - Unaffiliated individuals, business and indus-
                    trial employees

Narrative Report

Report each month selectively and succinctly information related to administration of volunteer resources. Exclude information previously reported in the report or in the valuation of gifts report.

Include in every report:

Recruitment contacts and projected plans

Include information such as:

Significant developments in
      departmental planning or utilization of volunteer resources
      community support and resources
      volunteer participation in alternate planning for patients

Human interest situation which
      depict or contribute to rehabilitation of patient(s)
      show chain reaction of staff and volunteer planning and implementation

New or unusual
      services, donations, administrative methods or requests for community
        resources

Amplification
      special projects in which volunteer resources are or could be integrated

Recognition methods
      tangible and intangible

Volunteer administration contacts
      individual or group meetings with community MH/MR or welfare staff
      new volunteer coordinators
      assistance with community volunteer orientation courses
      sharing of volunteer administration tools or publications

Attachments - Identify any original material with the name of the institution and date, and indicate distribution of original material. Check appropriate box. Include newspaper clippings and photographs only when they have some significance at the State level.

VALUATION OF GIFTS

	NEW	SURPLUS	USED	TOTAL
EQUIPMENT (e.g. renovating projects, furnishings, patient bldg., chapels, outside areas) electrical appliances, (P.A. systems, typewriters, medical and corrective appliances)	$	$	$	$
CLOTHING and ACCESSORIES (e.g. wearing apparel, handbags, jewelry)				
SUPPLIES **NON-EXPENDABLE** (e.g. games, books, religious articles, shrubs, household items, luggage)				
EXPENDABLE (e.g. refreshments, cosmetics, scrap materials, prizes, decorations, toys, batteries, magazines) (omit used)				
GIFTS DONATED FOR INDIVIDUALS (e.g. material gifts for birthdays, holidays, including Christmas stockings, expendable or non-expendable)				
PROFESSIONAL ENTERTAINMENT (e.g. musicians, movies, dancers)				
ADMISSIONS TO COMMUNITY RESOURCES (incl. commercial transportation, theaters, bowling lanes, fairs and swimming pools)				
CASH and BEQUESTS				
			GRAND TOTAL	$

MH 114 - 9-66

Information on the Valuation of Gifts report reflects trends and changes of attitudes both on the part of the community and of the staff. Information on this report coupled with the Monthly Report - Volunteer Resources, MH/MR 490, provides a more complete picture of total community participation. The material and funds resources donated by the community are important considerations in program and budgetary planning in addition to State appropriation and canteen fund resources. This is especially true when programs depend to a great extent on donated equipment and supplies.

Forms MH 114 are to be completed in quadruplicate to provide one copy to the superintendent, one copy to regional office staff, one copy to the Division of Volunteer Resources, and one copy for the Volunteer Resources Department file.

The report is due in the Division of Volunteer Resources on the <u>fifth working day</u> following the month reported.

Forms MH 114 and MH 115, tally sheet for Clothing donations, may be obtained through Internal Stores requisition, PW 300-R.

The estimated Valuation of Gifts is for <u>Staff Use Only</u>. Donors should not be requested to estimate the monetary value of their donations.

Donations should be recorded in the proper column.

<u>NEW</u> Donations of new equipment and supplies are primarily donated by individual or group volunteers. These are donations expressly purchased for patients and the institution.

<u>SURPLUS</u> Surplus donations are defined as new items from surplus stock, primarily from commercial vendors. Items will be estimated generally at half the retail value. Examples of surplus items are: magazines from news agencies, candy, clothing and cosmetics from manufacturers.

<u>USED</u> Supplies and equipment in good condition which are useful to the institution program should be reported in this category. Through interpretation of patients as individual persons and of the treatment program goals, discarded, unusable offers of supplies and equipment can be curtailed.

<u>EQUIPMENT</u> Equipment is defined as items of a more permanent nature which would normally be included in inventory. Equipment would probably serve more than one patient.

<u>CLOTHING & ACCESSORIES</u> They should be in wearable condition. Because the value can range from a custom-made suit to a cotton housedress, a low average monetary estimate is suggested:

        50¢ - - - - - - dresses, suits, coats
        25¢ - - - - - - skirts, blouses, slacks, shirts
        15-25¢ - - - - shoes
        10¢ per doz.- - ties, belts, socks, scarves, gloves, jewelry
                        and miscellaneous items

Staff judgment must be exercised but the above averages may serve as a guide.
A sample tally sheet MH 115, is attached which may be considered for use in
the Clothing Shop to maintain records of the number of the various items re-
ceived. The valuation would be determined in the Volunteer Resources Office.

SUPPLIES Supplies are determined as non-expendable or expendable in relation to
the specific article: for example; toys, games and books could appropriately fit
into either category. Supplies are usually intended for the use of more than
one patient.

REFRESHMENTS Refreshments of various types may be estimated with the assistance
of the dietician, program and volunteer resources staff so that a formula may be
developed of usual types of refreshments for sampling size groups of patients.

GIFTS DONATED FOR INDIVIDUALS Material gifts which are intended for individual
patients, even though not specified by name, should be recorded in this category.
They may be either expendable or non-expendable and include gifts for birthdays
and holidays, including Christmas stockings.

PROFESSIONAL ENTERTAINMENT A fair monetary estimate of spectator entertainment
should be made for service given in the institution by professional musicians,
actors, entertainers and for film rental through donated sources.

ADMISSIONS TO COMMUNITY RESOURCES Equivalency estimates should be made of ad-
missions, whether by ticket or group invitation, where fees are normally
charged. Many private facilities provide community experiences which show the
integration of patients into community participation functions. These services
should be reported in the Narrative Section of MH/MR 490. No monetary estimate
should be attempted for experiences such as guests in private homes or at
organization functions.

CASH AND BEQUESTS Cash donations for patients benefit should be reported, in-
cluding funds for store books, checks from individuals and groups, honoraria
accepted by staff when representing institution in planned speaking engagements;
bequests given for patients' benefit from community, relatives of patients and
deceased patients.

CLOTHING DONATIONS
Tally Sheet

DATE RECEIVED	DRESSES - SUITS COATS	SKIRTS - BLOUSES SLACKS - SKIRTS	SHOES	MISC. LOTS BELTS, TIES, SCARFS (Report by Doz.)

MH 115 - 9-66

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COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF PUBLIC WELFARE
Office of Mental Health and Office of Mental Retardation
Harrisburg 17120

OFFICE MEMORANDUM-MH/MR-1968-11

December 23, 1968

SUBJECT: Standard Certificate of Appreciation
for Volunteers and Groups

TO: ALL SUPERINTENDENTS AND DIRECTORS
State Mental Hospitals and State Schools and Hospitals

FROM: Joseph Adlestein, M.D.
Deputy Secretary for Mental Health
and Mental Retardation

A Standard Certificate of Appreciation to honor volunteers and
groups for their services to patients has been developed at the
request of the institutions.

The Certificate, which is based on sound recognition principles, is
earned through contribution of meaningful services. An educational
process of advance interpretation to volunteers, groups, and staff
will help to achieve understanding of the changes in criteria for
eligibility which may have been previously established at the
institution.

The printing and format of the Certificate are arranged by the DPW
Bureau of Office Services Reproduction Unit. The printed name of
the institution and typed name of the recipient, which will be
completed in the Reproduction Unit, will individualize the Standard
Certificate for the institution.

The criteria for eligibility, instructions for requesting certificates
and copies of the request form are attached. Additional forms for
requesting certificates may be obtained from the Division of Volunteer
Resources.

Attachments

INSTRUCTIONS FOR REQUESTING VOLUNTEER SERVICE AWARDS

Records should be reviewed to determine and support the eligibility of both regular individual and group volunteers. Requests for standard awards for volunteer services should be submitted as follows:

Recognition Pin – Instructions–page 31, Staff Guide For
Volunteer Resources.

Certificate of – Request Form   – Complete and submit two copies to the Division of Volunteer Resources no later than seven (7) weeks prior to the Recognition Program.

Attached Lists – List names of volunteers and/or
of Recipients   groups in alphabetical order, grouped by years of service.

The Certificate of Appreciation will be printed with the name of the institution by the DPW Bureau of Office Services Reproduction Unit. Based on the list attached to the request form, the name of the recipient and the length of service will be typed on the Certificate.

Embossed, gummed seals to denote multiple years of service will be sent with the completed order to be affixed at the institution in the lower left corner of the Certificate as indicated below. Adequate time should be planned to affix seals and to obtain signatures.

Years of Service	Seal
5	Blue
10	Red
15	Gold
20	Gold with ribbon

DVR
12/68

A standard certificate of appreciation for regular individual and group volunteers who provide service in State institutions is available. Eligibility for standard awards is based primarily on the continuity of service as an integral part of the program for one year or multiple of five years.

The criteria are as follows:

Regular Individual Volunteer
    Recognition pin - completion of the orientation course and
                      continuous satisfactory service emanating
                      from the institution for the year with a
                      minimum of approximately 100 hours of
                      service. No certificate is presented.
    Certificate of Appreciation -
                      One Year certificate - completion of the
                      orientation course and continuous satisfactory
                      service emanating from the institution for a
                      period of a year with a minimum of 75 hours.
                      Multiple of five years certificate -
                      five, ten, fifteen or twenty years of continuous
                      service following the receipt of a pin or one
                      year certificate with a minimum of 75 hours of
                      service each year.

Group Volunteers
    Certificate of Appreciation -
                      One Year certificate - participation at least
                      six times yearly in providing direct services,
                      donations, and/or other tangible support as an
                      integral part of the planned program.
                      Multiple of five years certificate - participation
                      as above for five, ten, fifteen or twenty continuous
                      years.

As relationships develop with multiple subdivisions of community organizations, the recognition may be more appropriately given at the district level.

In initiating the Standard Certificate of Appreciation, records for the year 1967-68 will be utilized to determine the eligibility for one year certificates. If comparable criteria have been utilized for previous years, multiple year certificates may be issued if volunteer resources records support eligibility.

The method of presentation of standard awards will vary. Representatives of administration, board of trustees, and/or supervisory staff may wish to be included in presentation. Each institution may determine method of presentation and location.

Date _____

SUBJECT: Request Form
                  Certificate of Appreciation - Volunteers

TO: Division of Volunteer Resources

FROM: _____
            (Name of Institution as it is to Appear on Certificate)

I wish to request the following certificates of appreciation for eligible
volunteers. The Recognition Program is scheduled for _____, 19__.
The correct names of volunteers and/or groups are attached on alphabetical
eligibility lists and grouped by years of service.

Certificates of Appreciation	Number Required
One Year of Service	_____
Multiple Years	
Five	_____
Ten	_____
Fifteen	_____
Twenty	_____
TOTAL	_____

Signed _____

Attachments