Using Technology to Move Volunteer Programs Forward

Johanna Watt, Loma Linda University Health
Maryellen Brady, Lucile Packard Children’s Hospital Stanford
Wendy Reese & Kathleen Grusenski, UC San Francisco Health
Michelle Morgan & Breanne Bogle, NCAL Kaiser Permanente Peer Group
Give the gift of service.

Volunteer.

MANY STRENGTHS. ONE MISSION.
A Seventh-day Adventist Organization

Johanna Watt – Director, Hospitality Services
Our Mission:
To continue the teaching and healing ministry of Jesus Christ
“To Make Man Whole”

Our Vision:
“Transforming Lives” through Education, Healthcare, & Research

» 15,400 Employees

» 6 Hospitals
  ➢ 1,071 total licensed beds
  ➢ Serving over 1.5 million patients each year
  ➢ 709 Physicians in 65 specialties and subspecialties

» 8 Schools: 4,444 Students

» First Hospital Based Proton Treatment Center – 25 years in service
Volunteer Services + Technology = SYNERGY!

Maryellen Brady
Director, Volunteer Services
Improving Volunteer Services

Wendy J. Reese, Director, Volunteer & Guest Services
Kathleen Grusenski, Business Systems Analyst
UCSF Volunteers

- Average age: 31
- Age range of current volunteers: 16 to 90
- # of active volunteers: 531
- 73% female
- Three largest programs by **hours:**
  - Child Life Services
  - Volunteer Office (Centralized)
  - Medical/Surgical ICU
Volunteer Management Solution

NCAL Volunteer Peer Group

Michelle Morgan - Volunteer Services Manager (San Jose/Santa Clara Medical Centers)
N. California Volunteer Services Peer Group

- Peer Group – Volunteer Manager/Coordinator each location
- Meet bi-monthly
- Regional Offices – Oakland, Ca
- Regional sponsorship
Pre-Work: Streamline/Integrations

• **Streamline Processes**
  • Onboarding steps (adult, student/youth)
  • Volunteer Agreement & Acknowledgement
  • Application
  • Initial Health Screening
  • Orientation/Training

• **Integrations**
  • Background Authorization
  • Employee Health
Where We Came From

26 Different processes
4 Different Applications
54 Different Web Site Pages

1 Standard Process
1 Standard Application
1 Standard Website

Teamwork
Regional Sponsor
PM Team
Volunteer Peer Group
First Advantage
Employee Health
KP IT
VMS
Volunteer Management Solution Update

- Interview volunteer management staff
  - Understand current workflows and pain points
- Document high level requirements
  - List to reference when engaging vendors for 1st time
- Research Industry leading solutions
  - Determined 4 to proceed with
- Conduct initial analysis of features vs requirements
- Finalize requirements
- Schedule demos
- Choose vendor to proceed with
  - Procurement
- Deployment of solution
  - Training, testing, timeline
Challenge

2011

~ 2,000+ volunteers on the database
~ 20+ programs
~ Antiquated system
~ Almost completely manual process
~ Not 100% compliant with policies and regulations
~ Online application, but no online process
~ Difficult and inaccurate reporting
~ WE drive the process
Wouldn’t it be nice if….

- Everything was online!
  - Application, dashboard, communication, scheduling
- Integrated system
- Mostly automated
- 100% compliant with policies and regulations
- Accurate and timely reporting
- THEY drove the process
Make a list of everything wanted / needed from the system:

~ Online application
~ Automated reference check
~ Integrations
~ Email capability
~ Volunteer dashboard

~ Decide what is a “must have” vs. “nice to have”
Reach out to others in your field and ask questions

~ Do they use a volunteer management system? If so, which one?
~ Do they like it? (what do they like best / least)
~ How does it benefit their department?

~ How many volunteers do they have?
~ Who is their volunteer population?
~ How many beds does their hospital have?
~ Do they service more than one facility?
Compare and Select

» Reach out to several VMS vendors
  ~ Go through your “wish list”
  ~ Request a demo
  ~ Ask for references
  ~ Request quote

» Make your selection

» Proceed with Approvals and Start of Project
VOLUNTEER WITH LOMA LINDA UNIVERSITY HEALTH

If you are looking for an opportunity to volunteer with Loma Linda University Health, click below and complete the application to make a difference.

APPLY NOW

Give the gift of service. Volunteer.

Why volunteer?
WELCOME Johanna Watt

LLU EID#: 19225601

Start Date: 11/04/2013
Last Work Date:
Career Hours: 506
YTD Hours: 500
Last Award:
Next Award:
Compliance Due:

Status: Active

See Compliance Record
Log Out
Evolution of Volunteer Services

**Current State**

**Volunteer registers for orientation**
- Staff assigns orientation
- Staff checks on completion
- Staff invites volunteer to interview

**Health Stream**
- Staff assigns courses
- Staff checks on completion
- Staff manually checks off in existing database

**Background Checks**
- Staff sends volunteer background check info
- Staff checks on completion
- Staff manually checks off in existing database

**OHS**
- Staff sends OHS info to volunteer via email
- Staff receives daily report with status
- Staff manually checks off in existing database

**Volunteer Placement**
- Staff creates paperwork: ID badge, competency checklist, drink bar code, parking info
- Staff sends paperwork packet to supervisor
- Supervisor prints and contacts volunteer for start date

---

“Ok, I’m in a paperwork mood. Let ‘er rip.”

Stanford Children’s Health
Lucile Packard Children’s Hospital
Stanford
New Hospital ● December 2017

- 2 FTE’s managing 700+ volunteers before the doors opened
- 700+ additional volunteers requested to serve the new hospital
- Additional compliance requests

What to do?
Volunteer Services

NEW Marketing page to support new software system

Volunteering at Stanford Children’s Health

We love and appreciate the hundreds of dedicated volunteers at Lucile Packard Children’s Hospital Stanford and Stanford Children’s Health. Whether they’re reading a bedtime story to a child, cuddling newborn babies or welcoming visitors to our hospital, volunteers are an important part of the extraordinary care we provide.

We appreciate your interest in volunteering at Lucile Packard Children’s Hospital Stanford. We are fortunate to have many people interested in volunteering. Registrations for our monthly volunteer orientation fill up quickly due to high demand. Please check back on our website to register for the next available orientation.

During the online orientation, a description of each volunteer opportunity, as well as its availability and requirements will be provided. We will go over any necessary online compliance courses, health clearance, security issues, policies and procedures.

An interview will be scheduled after the online orientation. An interview sheet will be emailed before the meeting. Please bring the completed interview sheet to your scheduled interview. Eligible participants will receive an email with the application after the interview.

New volunteer programs

With the opening of our new hospital, we are only accepting volunteers into one of new programs listed below:

• Hospital Explorer Program
• Treatment Waiting Area
• Gift Shop Expansion
• Child Life
• Family Resource Center

Search our volunteer opportunities >

Active Volunteers
Login & Track Hours

Prospective Volunteers
Apply to be a Volunteer

Lucile Packard Children's Hospital Stanford

Stanford Medicine
# New Volunteer Onboarding Checklist

**General Onboarding**

1. Create Profile
   - Complete

2. Take Orientation
   - Complete

3. Attend Group Interview
   - Complete

4. Complete Application
   - Please answer all questions and provide verifiable references.
   - Finish Application

**Take Online Compliance Courses**

5. Review References

6. Healthstream Complete

**Background Check Authorization**

7. Background Check
   - Expiration Date: Pending

**Complete Health Clearance Process**

8. Flu Vaccination

9. Annual Health Clearance

**Program Onboarding**

10. Annual Competency / Evaluation

---

**Mary Volunteer**

- **Status:** Active
- **Edit My Profile**
- **My Opportunities**
- **Parking Information**

- **Volunteer since:** 06/30/2011
- **Total Hours Served**
  - **Month:** 0
  - **Year:** 0
  - **Lifetime:** 68.15
- **Last Logbook Entry:** 2017-03-16
# Volunteer Services • FY’17 Notable Numbers

| 647 Volunteers | 58,797.79 hours dedicated | Over 120 programs | Equates to 28.183 FTE’s | $1,556,129.70 saved | 700+ additional volunteers for the new hospital |

## Volunteer Program Hours

<table>
<thead>
<tr>
<th>Mother and Baby Care</th>
<th>Support Services</th>
<th>Education</th>
<th>Play &amp; Recreation</th>
<th>In the Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trained Cuddlers = 7,813</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Newborn Hearing = 3,118</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buddies = 2,309</td>
<td>School = 943</td>
<td>Child Life = 5,448 (FYZ, Preschool, Activity &amp; Art Cart)</td>
<td>Sock Monkeys = 5,400</td>
<td></td>
</tr>
<tr>
<td>Patient Exp. = 1,990</td>
<td>PANS Clinic = 647</td>
<td>Pet Wellness = 460</td>
<td>Corporate Partners = 698</td>
<td></td>
</tr>
<tr>
<td>Ford Surgery = 930</td>
<td>Infant Dev. = 602</td>
<td>Dec My Room = 123</td>
<td>Auxiliary Affiliates = 5,903</td>
<td></td>
</tr>
<tr>
<td>Happy Wheels = 630</td>
<td>Family Resource = 1,940</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAV = 2,234</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gift Shop = 10,690</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welcome Desk = 1,437</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spiritual Care = 537</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Fun Facts

- 2,423 Buddy & Cuddler requests
- 1,371 patient visits by Patient Experience volunteers
- Over 300 monkeys made
- Over 35 rooms “dec’d”

## Room to Grow

- Treatment Waiting Area
- Family Resource Center
- Child Life
- Explorer Program
- Expansion of Buddy Program
- New Gift Shop
Flow Prior to New Database

Becoming a Volunteer at UCSF

Interested in becoming a volunteer?
- Call
- Email
- Walk-in
- Check website

If Supervisor accepts volunteer, the supervisor will complete the Volunteer Referral Form and Volunteer will return it to Volunteer Services for file.

Volunteer may not start until the Health Clearance, Background check, and Referral Form are complete. Once Volunteer Services receives all of the completed paperwork. Volunteer Services staff enters all data into Volgistics and generates a unique 6-digit pin number.

Volunteer contacts potential Volunteer Supervisor to set up a time to discuss his / her potential schedule and start date.

Volunteer purchases volunteer uniform ($20) from Volunteer Services.

Volunteer obtains ID badge through the Medical Center Security Office (Parnassus or Mission Bay), or online through Volgistics for evening / weekend volunteers.

Volunteer contacts Volunteer Services to sign up and attend 1-hour Information Session*. If Volunteer Services is not taking applications Volunteer will have to contact office again once the department is accepting applications.

volunteer receives referral form (form handed out)

Commitment and Schedule (form handed out)

Security and Privacy (form handed out)

Accidents and Liability issues

Attendance / Recording Volunteer Hours

Infection Control Presentation and Hand Hygiene

Volunteer contacts Volunteer Services to sign up and attend 1-hour Information Session* (held quarterly).

Volunteer signs up and attends a 3-hour volunteer Orientation*.

Volunteer attends additional training if assigned to F.A.S.T., CLS, Nursing, Volunteer Services, or Patient Relations.

Volunteer takes Health Clearance forms and immunization record copies to Occupational Health for provisional or final health clearance.

Volunteers must record hours in person (Volgistics Touch-Screen Sign-In computer at Parnassus or Mission Bay), or online through Volgistics for evening / weekend volunteers.

Immunization Records:
- Negative TB tests (one within the past year and one within the past 3 months) OR 1 negative quanterlteron test and 1 negative skin test completed within the past 3 months OR Negative chest x-ray
- MMR (Measles, Mumps, Rubella): 2 vaccinations or blood titre
- Chicken Pox (Varicella): 2 vaccinations or blood titre
- Tdap (Tetanus, Diphtheria, Pertussis): must be administered after 2005 to include booster shot
- Flu Vaccine (if Volunteer is on board during Flu Season - October through May)

During Individual Interview Volunteer Submits:
- HIPAAA
- Code of Conduct
- Hand Hygiene
- WE ID, Volunteer Badge Request Form
- Certifi FCRA Disclosure and Authorization Form for Background Check
- Receives Occupational Health Clearance Form
- Discusses volunteer assignment interest and is given a Volunteer Referral Form to bring to Supervisor for completion

In addition, Volunteer will sign up for any additional training if needed (F.A.S.T., CLS, Nursing, Patient Relations Rounding, etc.)
# New Database Program: Phases I & II

<table>
<thead>
<tr>
<th></th>
<th>BEFORE 2016</th>
<th>NOW (2018)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Database:</strong></td>
<td>Volgistics</td>
<td>WebBased Database and Website</td>
</tr>
<tr>
<td><strong>Staff:</strong></td>
<td>1 Manager, 2 Coordinators</td>
<td>1 Director, 1 Manager, 3 Coordinators &amp; 1 Business Systems Analyst</td>
</tr>
<tr>
<td><strong>Office Locations:</strong></td>
<td>Parnassus</td>
<td>Parnassus and Mission Bay</td>
</tr>
<tr>
<td><strong>Onboarding:</strong></td>
<td>6 weeks - up to 9 months</td>
<td>2 - 8 weeks, depends on user</td>
</tr>
<tr>
<td><strong>Signatures:</strong></td>
<td>Ink on several forms</td>
<td>DocuSign (online)</td>
</tr>
<tr>
<td><strong>Orientations:</strong></td>
<td>1 Hour + 3 Hour (in person only)</td>
<td>Learning Center &amp; Orientation online</td>
</tr>
<tr>
<td><strong>Background Check:</strong></td>
<td>Fingerprinting (in person/offsite)</td>
<td>Certiphi (online)</td>
</tr>
<tr>
<td><strong>Occupational Health:</strong></td>
<td>Go to your own Doctor</td>
<td>Provided through UCSF Occupational Health</td>
</tr>
<tr>
<td><strong>Uniforms:</strong></td>
<td>Charged $20 each</td>
<td>UCSF providing uniforms</td>
</tr>
<tr>
<td><strong>Trainings:</strong></td>
<td>In person</td>
<td>In person and Annual Online</td>
</tr>
<tr>
<td><strong>Phase II: Supervisor Module:</strong></td>
<td>No access to volunteer data</td>
<td>Online access to volunteer data</td>
</tr>
</tbody>
</table>
Database Build & Launch Timeline

Phase I: Volunteer Module

- Build began: July 2015
- Full Launch: November 2016
- Pilot Launch: May 2016
- System Enhancements: Spring/Summer 2017

Phase II: Supervisor Module

- Build began: September 2017
- Full Launch: July 2018
- Pilot Launch: November 2017
Circular Flow & Integrations

Volunteer Database

- YouTube
- Certiphi
- DocuSign
- Risk Mgmt
- Security
- HR
- Marketing
- UC Learning Center
- Occ Health.
The Power of Collaboration
The Power of Collaboration

1. Navigating the system

2. Training the internal team

3. Training the external team

4. Ongoing Enhancements
Our new Volunteer Website:
https://ucsfhealth.samaritan.com
Overview of Kaiser Permanente VMS System

Breanne Bogle, Volunteer Services Manager (Manteca/Modesto Medical Center)
Our NEW Northern California Volunteer Services Website

Volunteer Services

Enhancing the member experience through caring and compassionate service from the heart.

Volunteer-ncal.kp.org
Or
Volunteer-ncal.kaiserpermanente.org
New Volunteer Registration

Select the apply now (green button)

Directs the applicant to the eRecruiter site.
Read and Review the Applicant Requirements and if agree, select I Agree (blue button)

Agree to the volunteer agreements

Applicant Requirements

- Meet the age requirements:
  - Youth Applicants - ages 15-17 years (student volunteer opportunities not available at all Kaiser Permanente locations).
  - Adult Applicants - ages 18 years and older.
- Commit to a 4 hour shift, once a week for a minimum commitment, as declared by the Kaiser Permanente facility location.
- Be able to communicate effectively in English (second language skills are a plus).
- Successful completion of background investigation (Adult applicants only and included in the application process) or two letters of reference (Youth applicants only).
- Complete Initial Health Screening (included in the applications process).
- Complete Immunizations (as determined during Initial Health Screening and included in the application process).
- Able to meet the physical and behavioral requirements of volunteering (as determined by volunteer opportunity).
- Not actively seeking employment. Please note: Volunteering at Kaiser Permanente is not a precursor to employment. For employment opportunities, visit our Human Resources Department or apply online at jobs.kp.org.

I agree
The location selection will determine which Volunteer Department will receive the volunteer application.
Complete all required fields.

Create username (email) and password

When all required fields are complete, select the blue submit application button.
The Volunteer Dashboard – onboarding steps

Volunteer Dashboard guides the applicant through the application process.
Volunteer Management

One-Stop Shop
- Review/process applications
- Scheduling
- Reporting (individual areas/regional)
- Paperless files
Volunteer Connection

Annual Compliance Dashboard

Expired: Click on the expired Health Screening / Training to renew.

- Flu Expiration: 11/01/2018
- Annual Health Expiration: 10/23/2017
- Regional Compliance Training: 10/30/2017
- Annual Education/Facility Review: 11/30/2017
- Volunteer ID: 004479

Report Service

Search

Log Books

My Placed Opportunities

Surgery Information Desk
You've been placed with this opportunity.

Reporting service is not enabled for this opportunity

see details

You have logged 11.74 hours total since first starting on Friday, December 1st, 2017.
Wrapping it Up
Q & A