

# The Resident Action Box: A Record Keeping System for Volunteer Departments

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When the Hebrew Home of Greater Washington added a new building more than doubling the resident population to 550, we realized that our method of volunteer record keeping was insufficient and inadequate. Volunteers entered their names in a sign-in book, and recorded their hours on special file cards. The names of volunteers assigned to a specific resident were entered on a resident's card by the Director of Volunteers. With over 600 volunteers, an innovative approach was developed so that resident volunteer needs would be met and documented. The system would have to be simple, non-time consuming, be acceptable to the volunteers and yet serve to document and answer the following:

1. Activities performed by volunteers.
2. How much time volunteers spend in the performance of their various roles.
3. How many volunteers visit each resident, and the approximate length of these visits.

4. The amount of time needed to feed a resident, and/or escort a resident from one place in the building to another.
5. Goals for each resident, based on input from other departments—social service, nursing, activities, volunteers and our own evaluation.
6. Whether each residents' volunteer needs are being met.

We also wanted to establish a system which would enable us to prioritize residents who needed additional volunteer service.

## DESCRIPTION OF R.A.B.

A file box (4"x6") was created for each building, labelled the RESIDENT ACTION BOX (R.A.B.), and containing an index card for each resident. These boxes were situated on an accessible table in the volunteer lounge in each building. A typical card looks like the accompanying illustration.

Greenberg, Sarah		Room 781	
DATE	RESIDENT ACTION	AMT. TIME	VOL. NAME
1/3/85	visit	½ hour	B. Green
1/5/85	shopping for resident	1 hour	H. Cane
2/15/85	outdoors	20 minutes	J. Smith
2/20/85	shopping with resident	1 ½ hours	B. Brown
3/3/85	escort-bingo & assisted	1 hour	J. Horn
3/10/85	escort P.T. once/week	11 minutes	N. Diamond

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The "volunteer goal" for a new resident is based on information in the Social Service summary which includes data on the residents' interests/hobbies; work history; whether the resident has family and, if so, their geographical location. Also included is a comprehensive medical history and diagnosis. In addition, the Director of Volunteers and/or the Assistant Director of Volunteers either visit each new resident and/or receive feedback from the admissions volunteers, i.e., volunteers assigned to new residents. The volunteer goals may be changed or modified by the Director or Assistant Director of Volunteers.

### IMPLEMENTATION

Prior to formalizing our R.A.B. record keeping system, we asked approximately twenty volunteers to assist in a trial run. We found that many of our volunteer feeders, themselves seniors, had difficulty entering the information and required assistance. Interestingly, we also learned that our feeders often fed as many as six residents and visited twenty or more residents per day. Many of these volunteers worked on nursing units consisting of 33 residents, where most of the residents were mentally and/or physically impaired.

The volunteer escorts averaged twenty-five resident escorts a day to Physical Therapy, clinics, or activities. Both the feeders and escorts were individuals who often worked six, seven and even eight hours a day and most came more than once a week, with one volunteering five days a week. Thus, for both feeders and escorts, entry of all their volunteer activities would prove to be a cumbersome and time-consuming task requiring modification to the R.A.B. system.

A decision was made to have the feeders and escorts fill out the card once a month for each resident. Escort to an activity could be noted on an optional basis.

All volunteers were sent a newsletter describing this system. They were asked to fill out the applicable resident card(s) at the end of each volunteer day. We expected it to take a volunteer five to ten minutes to fill out the cards.

The volunteers continued to sign in the

volunteer book which allowed us immediate access to determine who was in the building. They also continued to keep a record of their total number of hours on their individual cards. These cards enabled us to keep a record of all volunteer hours.

In addition, we have another cross-reference file by volunteer name. In these files, which are kept in both volunteer offices, we keep a record of the names of residents that each volunteer visits on a regular basis. This cross reference is regularly (often weekly) reviewed with the volunteers and serves as the basis of our supervisory sessions.

### SPECIAL NEEDS

Colored tabs (blue for males and green for females) were placed on resident cards to indicate those residents having priority needs. The criteria for establishing priority need includes new residents, referrals from other departments or volunteers, as well as residents who have minimal or no family. The colored tabs which indicate the resident by sex were used for the following reasons: a) many of our volunteers prefer visiting residents of the same sex; b) we encourage our male volunteers to visit male residents because many prefer male companionship; c) female teenagers are instructed to visit only female residents, because of a few isolated incidents of inappropriate behavior by male residents.

The R.A.B. system also enabled volunteers who might have free time to choose a resident to visit from among these cards. Goals, and information about the resident, e.g., "no family," enabled the volunteer to decide whether he or she was the appropriate person to meet the need. In fact, the majority of volunteers gravitated toward the individual residents who had no family, since they could become a "surrogate family member." They also felt "more needed" and "useful," as residents with no family rely on volunteers for their shopping needs and for other personal chores often performed by one's family members. Most assignments however, continued to be made by the Director/Assistant Director of Volunteers.

### GROUP ACTIVITIES

Since many of the activities run by vol-

## GROUP ACTIVITY NOTEBOOK

Exercise class - Laura Smith, Volunteer				
RESIDENTS	8/4	8/11	8/18	8/25
Abbott	✓	-	-	✓
Boyer	-	✓	✓	✓
Cohen	✓	-	-	✓
Diskin	✓	✓	✓	✓
Efron	✓	✓	✓	✓

unteer leaders (exercise classes, jewelry classes, current events and the miscellaneous and sundry shop) included the same residents, these volunteer group leaders made entries into a notebook which was kept in an accessible place in the volunteer offices. This notebook, similar to a roll book, was divided by categories to include the name of the activity. The first page in each category listed the names of the residents who were regular participants or users of the service. The other pages in each section had dates with the volunteer checking off attendance. (See illustration.)

At the end of each month a volunteer was assigned to transfer this data onto the appropriate resident cards. This volunteer is also in charge of making R.A.B. cards for new residents (name and room number), as well as a rollodex card. The rollodex card includes date of birth, date of admission, and medical diagnosis. This rollodex file is kept in the volunteer offices and allows for the availability of basic information without having to search through the social service records. This work is done weekly and is reviewed by the Director of Volunteers.

### VOLUNTEER REACTIONS

As anticipated, there were a few instances of volunteer resistance, particularly among the older volunteers. Their arguments included the following;

*We don't want to do paperwork.*

*We don't want to be held accountable—we spent most of our lives working.*

*We could be spending the time with the residents.*

A few volunteers had difficulty writing, and those involved with many different residents, i.e., unit volunteers, found the task too time consuming. However, with time and patience, we were able to con-

vince most volunteers of the value of this system and many "did it for the residents."

### CONSEQUENCES AND RECOMMENDATIONS

A resident, Mrs. I., age 95, came to the Director of Volunteers to complain that she didn't have "any volunteer visitors." Having just reviewed her cards, the Director of Volunteers was surprised to hear this since the resident had numerous visitors during the month. As tactfully as possible, the Director of Volunteers removed the resident's cards from the file and told Mrs. I. that during a one month period, she had 18 volunteer visitors who spent a total of over 10 hours with her. She then asked, "who visited me?" After the entire list was read to her she said: "But these people are not volunteers, they are my friends."

We received a call from a concerned family member pertaining to his mother's "lack of activities." Apparently this was his mother's way of imparting guilt. He was both surprised and delighted when informed that his mother attended activities on a regular basis and that, the day before, she not only attended an exercise program, a jewelry class and bingo, but had also been assisted by a volunteer with her luncheon meal.

The social work staff in particular were delighted with this system. They could easily and immediately receive an update on resident-volunteer interaction(s) and offer suggestions.

Administration also seems pleased with this system, as it provides written accountability. It is also possible to provide administration with monthly reports based on the data provided by R.A.B.

A volunteer program is often seen as a luxury. This system could prove the value of the volunteer program and serve as a

tool in budgeting. We can show what and how much the volunteers are doing and how they impact on other departments and the client group served. Indeed, R.A.B. is a concrete way of showing "value."

In addition, for the volunteers the R.A.B. system means that they are accountable and "valuable." It provides feedback for the volunteer and for the Director of Volunteers and is useful in volunteer performance reviews.

After using this system for over four years, we have found that a number of volunteers who visit quite a few residents were spending too much time making entries on resident cards. It was suggested to them that they keep their own records and that they make entries once a month.

The R.A.B. file should be reviewed at least once a month. Goals may be revised,

new cards may be needed and priorities may be reset. Cards may be easily added or removed.

Since the cards get filled up rather quickly, we would suggest that larger index cards be used and/or cards be printed with the appropriate headings. The manual system could easily be adapted to a computer system, too.

The R.A.B. system permits easy access to data concerning the residents. It is a fairly easy and inexpensive method to determine whether and how resident needs are being met. This system also provides written goals, and an overview of volunteer work roles. R.A.B. allows for the availability of quantitative data and documentation concerning the allocation of volunteer time. Indirectly, it may also measure the effectiveness of the volunteer program.