

Volunteer Orientation

Suggested Agenda Items (Select items as appropriate for group)

- Welcome and introductions
- Goals/learning objectives for the orientation – what attendees will know when session is over
- Ice breaker/teambuilding activity – helps get everyone talking & comfortable with each other
- Chapter history and bylaws
- Overview of HFMA and its structure – chapter, region, national
- Overview of chapter leadership structure and duties – board and committees
- Chapter vision, mission and values
- Chapter strategic plan or/or annual plan (or portion of it that pertains to the group)
- Chapter Balanced Scorecard (CBSC goals) and DCMS requirements (or portion of it that pertains to the group)
- Committee action plan
- Committee assignments
- Position responsibilities, expectations, and deadlines
- Chapter budget
- Chapter demographics
- Chapter Member Survey results
- Overview of chapter website
- Overview of HFMA website – Chapter Leaders section
- Overview of volunteer tools, forms, and resources

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Suggested Handouts (*Select items as appropriate for group*)

- Chapter history or fact sheet
- Chapter leadership organization chart or list
- HFMA Organizational structure chart
- HFMA acronyms list
- Chapter vision, mission, and value statement
- Chapter strategic plan or/or annual plan (or portion of it that pertains to the group)
- CBSC goals for the year
- DCMS requirements for the year
- Committee action plan
- Chapter budget
- Reports
 - DCMS Acknowledgement Report
 - CBSC Progress Report
 - Program Planning Tool (PPT) Report
 - 5 Year Chapter Performance Metrics
 - Chapter Member Satisfaction Survey Results
 - Membership End of Month Reports
 - Chapter Profile Demographic Reports
 - Market Segment Reports and Chapter Maps
 - Chapter Generational Breakdown
- Chapter bylaws
- Chapter policies and procedures manual
- Chapter job descriptions
- HFMA Planning Calendar and Resource Guide
- Tools, forms, and other resources (as appropriate for group)
- Contact list – leadership team and committee members
- Chapter Calendar or Meeting/Event Schedule
- Laddaga's Rules of Order