

# 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
  - Committee assignments
  - Position responsibilities, expectations, and deadlines
  - Committee action plan
- Chapter vision, mission and values
- Chapter strategic plan, success plan and/or annual plan (or portion of it that pertains to the group)
- Chapter budget
- Chapter Member Survey results
- DCMS policy requirements (or portion of it that pertains to the group)
- Overview of websites
  - HFMA website
  - Chapter website
  - Chapter Resource Center – Volunteer tools, forms, and resources

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## **Suggested Handouts and References** (*Select items as appropriate for group*)

- Chapter history or fact sheet
- Chapter bylaws
- Chapter policies and procedures manual
- Chapter job descriptions
- HFMA organizational structure chart
- Chapter leadership organization chart or list
  - Contact list – leadership team and committee members
- Chapter vision, mission, and value statement
- Chapter strategic plan, success plan and/or annual plan (or portion of it that pertains to the group)
- Committee action plan
- Chapter budget
- Chapter Member Satisfaction Survey Results
- Chapter Calendar and/or Meeting/Event Schedule
- Tools, forms, and other resources (as appropriate for group)
- References in Chapter Resource Center
  - Chapter Planning [page](#)
    - Important Dates to Remember
    - DCMS policy
  - [Robert's Rules of Order](#)