VOLUNTEER
EMERGENCY MEDICAL SYSTEMS
A MANAGEMENT GUIDE

Prepared by
EMS Volunteers for EMS Volunteers
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The Center for Volunteer Development

Virginia Cooperative Extension
VIRGINIA TECH AND VIRGINIA STATE ———————————— *VIRGINIA'S LAND GRANT UNIVERSITIES*

The Center for Volunteer Development, a unit of Virginia Tech's public service outreach, is pleased to be a partner with Virginia's regional executive directors of the emergency medical system in providing this squad management handbook. A primary role of the Center has been to encourage the EMS directors to prepare information which--in their judgment--would cover common operating concerns of squads. The Center served as host to the directors listed below as they planned the handbook and prepared first drafts of chapters. Jane Wills subsequently assumed leadership for preparation of the manuscript, and she and Terry Wright became principal authors. Although Melinda Duncan, acting director, Northern Virginia EMS Council, Annandale, and James Chandler, executive director, Tidewater EMS Council, Norfolk, were not members of the initial planning group, each graciously agreed to prepare a chapter for the handbook. CVD staff member Jane Janey provided editorial and publication assistance.

One copy of the handbook is being distributed to each volunteer rescue squad in Virginia. Additional copies will be available at cost. Other groups or individuals interested in a copy of the handbook should contact the Center for Volunteer Development, CEC - CVD Suite, Virginia Tech, Blacksburg, VA 24061-0150. Telephone (703) 231-9342. Virginia residents may call 1-800-572-2180 for information.

Vassie Vaught, Executive Director
Southwest EMS Council
205 West Main Street
Abingdon, VA 24210

Gary Lautenschlager, Executive Director
Western Virginia EMS Council
102 East Main Street
Salem, VA 24153

Michael Butler, Executive Director
Virginia Federation of EMS Councils
P. O. Box 23
Winchester, VA 22601

Terry Wright *(former Executive Director)*
Old Dominion EMS Alliance
1613 Rhoadmiller Street
Richmond, VA 23220-1106

Jane Wills, Executive Director
Peninsulas EMS Council
P. O. Box 1080
Hayes, VA 23072-1080

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ORGANIZATION AND ADMINISTRATION

All volunteer rescue squads may appear to be the same, but actually they are not. Some squads, for example, may be more dependent than others upon organizations such as the United Way, local government, or even private business. Some serve affluent areas, while others serve areas where clients have a lower income. Each of these differences affects the call volume, manpower needs, and funding requirements of a squad.

Some organizational and administrative elements, such as the following, are common to all squads:

1.	Legal existence	6.	Interorganizational relationships
2.	Purpose	7.	Planning
3.	Administrative structure	8.	Leadership
4.	Finances	9.	Public relations
5.	License and certification	10.	Risk management

Sound performance in each of the above areas strengthens the squad and prepares it for high-quality emergency medical care.

LEGAL EXISTENCE

Most volunteer rescue squads are incorporated as nonprofit tax-exempt organizations. This means certain reports and documents must be filed with the state or federal government, or retained by the squad. Failure to do so can result in disincorporation of the squad, the levying of penalties, law suits, or other similar problems. Some basic legal requirements are listed below. Consult an attorney to see if the squad complies with these and others that may be required by the state or federal government.

A. **Corporate Charter/Articles of Incorporation:** Articles of Incorporation state purposes and scope of service. They are the basic governing document of the squad and are filed with the Secretary of State or State Corporation Commission.

Check to see if Articles of Incorporation have been filed for the squad, and--if so--do they still reflect the current purpose and scope of services? If not, submit articles of amendment. Also, be sure to submit annual renewal statements or registration forms required by the state. Failure to do this may result in disincorporation of the squad.

B. **Bylaws:** Bylaws are legal guidelines for daily operation of a squad. They are--in effect--the commissioning document of the squad. In fact, they may be the most important policy document you have. As such, they deserve close examination. It is important that they reflect the true purpose of the squad, are complete in their scope, and that amendments are limited.

Bylaws are not usually filed with the state. They are, however, required of a nonprofit corporation and are more specific than Articles of Incorporation. Bylaws don't need to be complex, but they do need to be complete enough to ensure that the squad operates smoothly and is protected in its operations. Typical bylaws contain, at a minimum, nine basic provisions called articles: name of the organization; object or mission; criteria for membership; officers and their election; meetings; provisions for the board of directors; committees; parliamentary authority; and procedures for revisions. You can obtain help with preparation of bylaws from

the squad's attorney or other nonprofit associations. (See the end of this chapter for a sample set of bylaws.)

Review the bylaws periodically to determine if they still reflect the purpose, organizational structure and procedures of the squad. This review can occur as often as you wish, but should be done at least every five years. If the bylaws lack any of the elements in the checklist below, revision may be needed.

Checklist for Review of Bylaws

____ Name of the organization	____ Provisions for board of directors
____ Statement of organizational purpose	____ Employment of staff (if applicable)
____ Description and criteria for voting membership	____ Number and description of standing committees
____ Expulsion from membership	
____ Duties of officers	____ Appointment of committee chairpersons and their tenure, filling vacancies
____ Election of officers	
____ Terms of office	____ Statement of fiscal year
____ Filling officer vacancies	____ Required reports (annual audit, annual report, etc.)
____ Removal of officers	
____ Number of meetings held each year	____ Parliamentary authority
____ Annual meeting date	____ Dissolution
____ Special meeting procedures	____ Amendment of bylaws
____ Quorum	

C. **Internal Revenue Service Provisions:** As a 501(c) (3) nonprofit corporation, the IRS exempts the squad from some taxes, but it does not exempt it from filing a tax return or from paying certain types of taxes. Each nonprofit 501(c) (3) corporation is required to file a yearly tax return known as Form 990. The corporate structure of the squad and the type of income it receives will determine if the squad must file other returns or reports. It may be helpful to consult an accountant with experience in nonprofit organizations to determine which returns or taxes the squad is required to file. (Details on tax-exempt status appear in Chapter 2.)

D. **State Laws on Charitable Solicitations:** Some states require nonprofits that solicit public contributions to register with the state or file certain documents. (The Virginia Solicitation of Contributions Act is discussed in Chapter 5.)

E. **Retaining Records and Releasing Information:** Each squad should develop policies which address government investigations, record retention, and information release.

1. Government Investigations: Volunteer rescue squads seldom undergo government investigations. If one happens, however, the squad's response should be such that the corporation, board of directors and members will be protected. It is advisable, on occasion, to cooperate fully with investigators; and, at other times, equally advisable to resist. Only competent counsel can help you decide how to proceed. The squad's chief executive officer (president, captain, board chairperson, etc.) is generally the official spokesperson and should be the only person within the squad to speak with any government investigator or official. During the course of an investigation, the chief officer should seek advice about making books, records, reports, etc., available to the investigator. A legal counsellor, accountant, or both, will be able to advise you.

2. <u>Record Retention</u>: Dispose of some records after a specified time. The statute of limitations for the following records is offered as a guide, but may not pertain to every state:

- ☛ Civil tax liability without fraud . . . . 3 years
- ☛ Criminal tax liability . . . . 6 years
- ☛ Civil antitrust . . . . 4 years
- ☛ Criminal antitrust . . . . 5 years
- ☛ Contracts . . . . 3-5 years
- ☛ Negligence or malpractice . . . . varies (check with your state)
- ☛ Employee withholding tax records . . . . 4 years

As a general rule, you should permanently retain minutes of meetings, articles of incorporation, bylaws, and policies and procedures. Keep run reports for at least five years. You may need to keep records involving minors until they have had their eighteenth birthday. Generally, you may dispose of other records and documents after six-to-eight years. NOTE: Since laws tend to be different among states, consult an attorney before you develop record-retention policies or destroy any documents.

3. <u>Information Release</u>: The squad will benefit if you release information to which the public has a right. Such information is usually in the form of publications, statistical reports, educational programs, etc. Information that is considered confidential includes membership lists or directories, salaries paid to employees, and patient information. Be sure all squad members, especially the board of directors and officers, know what information may or may not be released. Consult the squad's attorney before you develop specific policies in regard to information release.

F. **Selecting Attorneys and Accountants**: Many volunteer rescue squads have legal advisors, and some have accountants, who help with financial matters. These professionals are invaluable resources. Base your selection(s) on competence, compatibility with the squad, and cost of service.

Select an attorney with nonprofit tax-exempt experience such as exempt tax law, corporate law, administrative agency representation, medical malpractice experience (or who at least has contacts with experts in this field), and who has legislative contacts. The squad's general counsel can help obtain the services of a defense attorney if the squad becomes involved in a suit.

Look for an accountant with experience helping nonprofit tax-exempt corporations. Such professionals usually have other nonprofit organizations as clients.

Consider the type of relationship professionals will have with the squad, its directors and members. (Generally, professionals should not be voting members of the board of directors.) Discuss this relationship with the professionals so there will be no misunderstandings. Finally, consider the cost of professional service. Can the squad afford the services of professionals, and do their services justify the cost incurred? Some attorneys and accountants will offer their services at no cost or at reduced rates.

Appoint a committee from the board to select an attorney, accountant, or both. The committee should gather information (bylaws, articles of incorporation, tax returns, etc.) so it can present a realistic picture of the squad's needs and determine the amount of time the professional might have to dedicate to those needs.

G. **Acceptance and Expulsion of Members**: Members are the most important resource of any squad, and it is important to have legal counsel before establishing membership criteria and procedures.

Denial of membership, or expulsion from membership without just cause, can result in an unwanted lawsuit or negative publicity. Keep in mind the following when membership criteria and procedures and cause for expulsion are considered:

❶   Reasonable and objective criteria for membership must be established;
❷   Acceptance procedures must be reasonable and applied in non-discriminatory fashion;
❸   Expelling a member must be based on justifiable cause; and
❹   Due process must be assured before any member is expelled.

Reasonable criteria for membership might include a specific minimum age or that a prospective member reside in a given geographical area, such as the service area. Consideration of sex, race and religion, and requiring sponsorship by a member or members are considered unreasonable criteria. List membership procedures and requirements in the bylaws and include them in the application packet so potential members are aware of them. Grounds for expulsion from membership and the expulsion procedure should also appear in the bylaws and application packet.

Reasons for expulsion should be justifiable, and written notice of the charges, time, date and place of hearing must be provided. A hearing should be conducted by an impartial group and offer the accused member an opportunity to examine evidence and witnesses and to refute charges. (A source of information related to hearings is <u>Robert's Rules of Order, Newly Revised</u>.)

THE BOARD OF DIRECTORS

Volunteer rescue squads established as nonprofit corporations are legally required to be governed by a board of directors. Boards are generally of two types:

1.   <u>Comprised of squad members</u>. This type of board usually tries to be democratic and friendly. Members often have a reasonable knowledge of patient care issues, but may lack sound administrative backgrounds.

2.   <u>Comprised of business and financial leaders selected or elected from the community</u>. This type of board tends to have a strong sense of business, awareness of financial issues, and good rapport with other organizations. Its members, however, typically lack a fundamental understanding of EMS issues.

Some squads have both types of boards. Squads with community boards will sometimes establish executive committees comprised of squad officers and other members to attend to field operation issues. Others who have boards comprised of squad members may establish advisory boards of business leaders or include them on the governing board.

Whichever type of board the squad has, it must be responsible for the welfare of citizens served by the squad and to the squad itself. This means it must be responsive to community and corporate needs, strive to meet the purpose of the organization, and develop and maintain program services.

An effective board:

1.   Works as a team.
2.   Is accountable to the people it serves and to the organization.
3.   Sets policies and goals of the organization.
4.   Prioritizes goals and delegates responsibility to get the work done.
5.   Evaluates program effectiveness.

6. Oversees fundraising activities.
7. Manages assets of the squad.
8. Reviews bylaws periodically.
9. Reviews and evaluates its own productivity periodically.

A. **Board Selection:** A board of directors should be composed of individuals who are qualified, understand their roles and responsibilities, and actively participate. It is common for a volunteer rescue squad to elect directors from its membership. The choice of a director may be based on the popularity of the individual and, at times, just his or her willingness to serve. This method of selection prevents the board from functioning effectively.
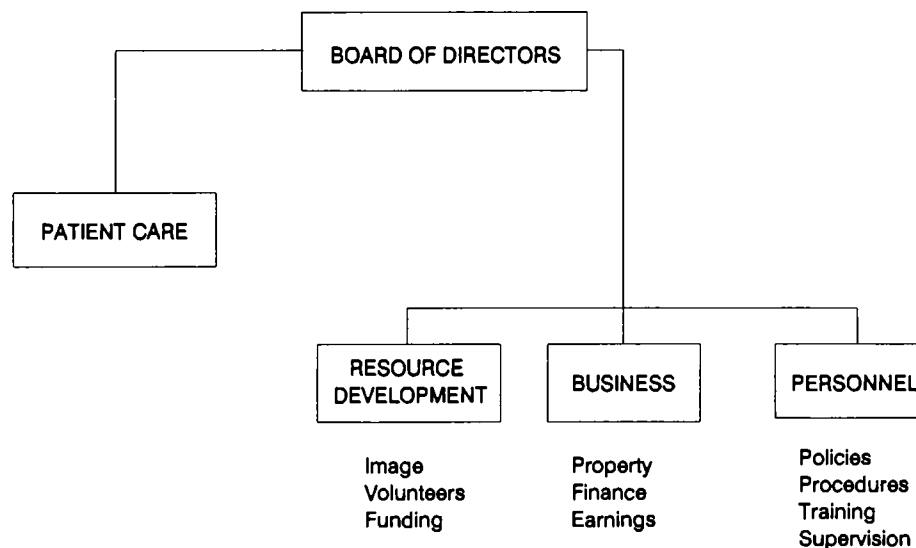
Use the questions below to help find qualified people. However, do not expect every potential board member to meet each of the criteria. (See p. 9 for checklist for board members.)

1. Are they independent of intersquad cliques?
2. Are they secure in their own profession or business?
3. Are they highly regarded or respected in the squad?
4. Are they knowledgeable about the squad's goals and needs?
5. Do they know what is expected of a board member?
6. Do they have an interest in the squad?
7. Do they have time to participate actively?
8. Do they have influence in the community?
9. Do they have integrity?

B. **Management:** An effective board of directors is one that practices sound management. Squad members sometimes consider management to be only those things which pertain to supervision of members in the performance of patient care duties. This is indeed important, but squad management involves not only the quality of its service but also its ability to manage resources necessary to provide the service. The model below presents an efficient management structure for volunteer rescue squads.

SERVICE DELIVERY   SUPPORT SERVICES

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                      ┌──────────────────────┐
          ┌───────────│ BOARD OF DIRECTORS    │──┐
          │           └──────────────────────┘  │
  ┌───────┴──────┐                               │
  │ PATIENT CARE │                               │
  └──────────────┘                               │
                    ┌───────────┬────────────┬───────────┐
              ┌─────┴─────┐ ┌───┴────┐  ┌────┴──────┐
              │ RESOURCE  │ │BUSINESS│  │ PERSONNEL │
              │DEVELOPMENT│ └────────┘  └───────────┘
              └───────────┘
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RESOURCE DEVELOPMENT   BUSINESS   PERSONNEL

Image   Property   Policies
Volunteers   Finance   Procedures
Funding   Earnings   Training
                                             Supervision

Adapted from The Effective Voluntary Board of Directors, Conrad & Glen, Ohio University Press, 1983.

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In the model on page 5, the board oversees service delivery and support services, two major business divisions. Service delivery is the provision of emergency medical care to citizens. Squads tend to direct most of their attention and financial resources toward this area, especially since it deals with their primary organizational goals. Emergency medical care, however, must be supported by equally important programs such as resource development, business development and personnel development. The loss of any one of these support services will affect the quality of service delivery.

Resource Development: This refers to the squad's ability to secure adequate volunteers and funding. The squad's image is an important element in maintaining community trust, assuring financial support, and attracting volunteers.

Business Development: Many volunteer rescue squads control more money than some small businesses, most of which comes from public funds. Sound financial management is imperative. Fiscal management includes the budget process, management of property and equipment, and the management of investments and earnings income. Included in business development are compliance with state, federal, and local laws, and certification and license requirements.

Personnel Development: Members are the squad's most important resource. Without them, service cannot be provided at any level. To maintain an adequate number of volunteers, the squad must spend considerable time recruiting, retaining and training volunteers. Written policies, procedures, and expectations must be made available to all members and potential members. Without these documents, individual expectations and the desire to do what is right will vary widely, and a high rate of turnover is likely to occur.

Squad management must be shared by officers, the board of directors, and members. This type of management helps individual members feel more responsible because they feel needed. It does require, however, that the board provide written policies and procedures so that everyone will be aware of the rules. When policies and procedures are written and tasks are delegated, management is not such a burden, and the board can spend more of its time on other responsibilities that promote effective program services.

POLICIES AND PROCEDURES

Policies and procedures, along with bylaws, are the framework for sound squad management. A **policy** is a written statement of a governing principle or process and represents the squad's official position on that particular issue (e.g., squad will retain run forms for a period of five years, plus the current year). A **procedure** is an established method for getting something specific done (e.g., implementing a disaster plan).

Develop policies and procedures so they are easy to change. One good way is to write each on a separate sheet of paper and place all of them in a loose-leaf binder. Divide the manual into sections (i.e., administrative, training, dispatching, etc.) and include a table of contents for easy reference. Be sure all members know where the policies and procedures manual is kept, and that access is easy.

Developing policies and procedures is an ongoing task. It is a good idea to assign one person, (or a small group), the responsibility to compile and revise the manual. Developing a policy and procedures manual is not a task which can be completed in a short time. After many reviews and

revisions, however, the squad will have a manual which members have helped to develop, and this will make it more acceptable to them. Each policy and procedure should be periodically reviewed to assure that it continues to meet the squad's goals.

THE ANNUAL REPORT

Almost all organizations prepare annual reports--local government for its citizens, businesses for their stockholders, associations for their members. Many bylaws or constitutions actually require an annual report. Annual squad reports can serve the following purposes:

- ☛ Summarize progress for the past year.
- ☛ Explain what the rescue squad does.
- ☛ Document financial status and needs of squad.
- ☛ Be an integral part of fundraising and membership recruitment programs.
- ☛ Recognize the important contributions of members and financial donors.
- ☛ Be used to retain members by reinforcing the extent and value of their work.

Much of the contents of a good report may already be in the squad's files. If this information is brought together into a single report, the squad will have an excellent tool for public education, membership recruitment and retention, and fundraising. The following outline provides suggestions for report content, design, and distribution:

A. **Content:**

1. **Cover**

2. **Letter of transmittal** (on letterhead) from the president or captain.

3. **Written narrative about the past year.** Summarize successes and disappointments. Concentrate on goals, how they were met and what remains to be done.

4. **Operational Information.** Include emergency work, standbys, public service calls, interagency support, and mutual-aid responses. Consider preparing a chart of increased-call volume each year for the past 10 years; a chart of calls by month, day of week or time of day; a table of number of calls by injury and illness type; or a map of the service area. This is the opportunity to tell people what the squad does.

5. **Training Information.** Provide statistics about the level of training the members have. Celebrate improvements of the past year.

6. **Public Education Information.** Tell people about EMS week activities, Health Fair participation, blood pressure screening, CPR classes, newspaper coverage, etc. Include samples of educational materials distributed.

7. **Membership Information.** Include number of members or even a list of the membership. List officers and life members. Mention those who participated on regional councils and committees and those who received Virginia Association of Volunteer Rescue Squads (VAVRS) awards and other honors. Identify squad member of the year or other award winners.

8. **Financial Report.** Include a year-end operating statement (auditor's report is a good choice). Also consider adding information on the annual fund drive, grants received, in-kind matches, and a list of major contributors. This is an opportunity to thank people.

B.   **Design:** Make the annual report neat and professional looking, but not expensive. Photographs, typesetting and fancy covers are not necessary; however, clean typing, good photocopy, correct spelling and clear writing are. Charts, maps and statistical information are well-received, so you may need very little narrative. The report does not have to be lengthy; 8- to 16-pages is common. Since charts and graphs add to the length of the report, it may be important to be selective in your choices.

Preparing the annual report becomes easier each year because previous reports can be used as guides. Go to the local library and look at reports from local government, businesses and charities. Once the report is produced, the squad will find many uses for it. For example, charts and graphs can be used for grant applications, activity reports, newspaper articles and other promotional projects.

C.   **Distribution:** The annual report is a tool. Distribute a copy to anyone who has helped or is in a position to help, and remember to keep a copy for the files.. The following are examples:

1.	Members	6.	Local legislators
2.	Contributors	7.	VAVRS
3.	Recruits	8.	Regional EMS Council
4.	Local government officials	9.	Newspaper editors
5.	City/County council members	10.	Life members

SQUAD ADMINISTRATIVE DOCUMENTS

Check List

For <u>each</u> document listed below:

1.   *Know location of the original.*
2.   *Be sure date of effectiveness is clearly marked.*
3.   *Review periodically and keep current.*
4.   *Keep amendments with the document.*
5.   *For those documents dealing with personnel, include job descriptions, personnel action, and procedures for selecting individuals.*

[ ]   Articles of Incorporation

[ ]   Bylaws

[ ]   501(c) (3) status

[ ]   Registration as per the Virginia Solicitation of Contributions Act

[ ]   General counsel appointed

[ ]   Board Performance Evaluation

[ ]   Written personnel policies

[ ]   Routine delegation of tasks to all members

[ ]   Current Policies and Procedures Manual

[ ]   Annual report

MAKE DOCUMENTS EASILY ACCESSIBLE TO ALL MEMBERS.

CHECKLIST FOR BOARD MEMBERS

(Ideally, all or at least several members of the board should complete this checklist, and compare and discuss results.)

Directions

Place two checks if you're sure it's true or fully true......
Place one check if you're uncertain or if it's only partly true......
Leave the line blank if it's not true......

_____ 1.   The mission, purposes, and goals of the board are clearly defined and in writing.

_____ 2.   I support the mission, purposes, and goals of the organization.

_____ 3.   The role of the board in relation to the organization is clearly defined.

_____ 4.   I understand what is expected of the board--what it should and should not do.

_____ 5.   I know what is expected of <u>me</u> on the board.

_____ 6.   My role was fully explained to me prior to my joining the board.

_____ 7.   I think my role on the board is appropriate in terms of my background, experience, capabilities, available time, and desire to serve.

_____ 8.   I regularly attend board meetings.

_____ 9.   There is enough time at the board meetings to spend on important agenda items.

_____10.   Board members can place items on the agenda.

_____11.   Our membership is representative of the capabilities and constituencies needed for our purposes and responsibilities.

_____12.   Women are sufficiently represented on our board.

_____13.   Ethnic and racial minorities are sufficiently represented on the board.

_____14.   Prospective board members are carefully interviewed and evaluated beforehand and selected in accordance with board needs and balance.

_____15.   We have a nominating committee for board members, and a clear, well-thought-out board membership policy.

_____16.   Board meetings are held at a convenient place.

_____17.   Board meetings are held at a convenient time.

_____18.   The board has at least several standing committees or task forces.

_____19.   These committees or task forces meet or otherwise communicate regularly outside of board meetings and report back to the board at all or most board meetings.

CHECKLIST FOR BOARD MEMBERS (Continued)

_____20. Board meetings consistently follow an orderly, rational process such as <u>Robert's Rules of Order</u>.

_____21. Meeting length is neither too long nor too short in relation to the planned agenda and other business we must conduct.

_____22. We have enough time to consider carefully important decisions.

_____23. We don't waste time on trivia or unnecessary matters.

_____24. The board is appropriately organized to carry out its mission.

_____25. Board directions are set and decisions made with full and balanced participation of all.

_____26. At least once each year training related to effective functioning as a board member is provided.

_____27. Board members mutually respect each other; there are no factions.

_____28. Board meeting dates are set in advance, in full consultation with board members.

_____29. We are reminded of date and place as the meeting draws near.

_____30. Each board member receives a written agenda for the next meeting early enough to study it before the meeting.

_____31. Each board member is provided with a complete up-to-date list of board member addresses and phone numbers.

_____32. I feel that I get adequate information from staff or the board chairman to help me prepare for my role on the board.

_____33. I fulfill one or more specific ongoing committee or individual task assignments for the board.

_____34. Board/staff relationships are good.

_____35. My legal responsibilities on the board and potential liabilities have been clearly spelled out.

_____36. In general, board decisions have a substantial positive impact on the direction and functioning of the squad.

This checklist is taken in large part from one developed by Dr. Ivan Scheier, director, Center for Creative Community, Santa Fe, New Mexico 87504.

SAMPLE BYLAWS FOR NONPROFIT VOLUNTEER RESCUE SQUADS

ARTICLE I.
Name

The name of this organization shall be _____ Volunteer Rescue Squad, Incorporated.

ARTICLE II.
Purpose

Section 1. The purpose of this organization is exclusively charitable, educational, and solely in furtherance thereof: *(List statements contained in Articles of Incorporation.)*

Section 2. The Corporation shall operate on a calendar year *(January 1 to December 31)*.

ARTICLE III.
Members

Section 1. Membership in the Corporation shall be open to persons: *(List membership requirements)* and, who have completed the application process.

Section 2. Membership shall be divided into the following classes: *(List all classes of membership here. Then, in a separate paragraph, provide an explanation of each class of membership.)*

ARTICLE IV.
Officers of the Corporation

Section 1. The officers of the Corporation shall be *(list)* _____. These officers shall perform the duties prescribed by these Bylaws and by the parliamentary authority adopted by the Corporation.

Section 2. The President shall preside at meetings of the Board. He shall have the power to make and execute contracts in the ordinary business of the Corporation and, for and in the name of the Corporation, to execute other legal instruments when authorized by the Board. He shall appoint the members of all committees of the Board (unless otherwise specified in these Bylaws or by resolution of the Board), and shall have such other powers and duties as may be assigned to him by the Board.

The Vice-President shall exercise all powers and perform all duties of President during the latter's absence or inability to act, or should the office of the President be vacant, and perform any other duties assigned by the President.

The Secretary shall have charge of such books, documents, and papers as the Board of Directors may determine; attend and keep the minutes of all meetings of the Board of Directors and General Membership meetings; and sign, with the President, in the name and on behalf of the Corporation, any contracts or agreements authorized by the Board of Directors. The Secretary shall, in general, perform all duties incident to the office of Secretary, subject to the control of the Board of Directors, and perform such other duties as may be assigned by the Board of Directors.

The Treasurer shall have custody of the monies and securities of the Corporation; keep correct and complete books and records of accounts, balanced monthly; sign or countersign such instruments as

required for signature; have available at all times the books and records of accounts for examination; and perform such other duties as are incident to the office or required by the Board of Directors.

Section 3. The officers shall be elected by ballot at the Corporation's annual meeting to serve for _____ year(s), or until their successors are elected, and their term of office shall begin at the close of the annual meeting at which they are elected. No member shall hold more than one office at a time.

Section 4. If an office becomes vacant between annual elections, the vacancy shall be announced, and the presiding officer shall direct the Nominating Committee to present a nominee at the next meeting. At that regularly scheduled meeting, after a report from the Nominating Committee and nominations from the floor, the vacancy will be filled by election by ballot.

Section 5. Any regularly elected officer or Director of the Corporation may be removed from office for cause. Upon written complaint by any member in good standing, the matter shall be referred to the Committee on Discipline. The Chairman of the Committee on Discipline shall submit its recommendations at the next regular meeting. If the recommendation is for removal from office, upon a motion and a two-thirds majority vote of the membership, the officer or director shall be removed from office.

ARTICLE V.
Meetings

(If your squad conducts general membership meetings, include this article.)

Section 1. The general membership meetings of the Corporation shall be held on *(e.g., first Wednesday)* of each month at the _____ Volunteer Rescue Squad or *(other place)*.

Section 2. The regular meeting on *(day of week, month)* shall be known as the Annual Meeting and shall be for the purpose of electing officers, directors, receiving reports of officers and committees, and for any other business that may arise.

Section 3. Special meetings of the general membership may be called by the President or upon the written request of any *(number)* voting members in good standing of the Corporation. The purpose of the meeting shall be stated in the call. Except in cases of emergency, at least three days notice shall be given. Notice of all special meetings shall be made to the members in writing and mailed to their home address, except in the case of an emergency when the notice may then be given at least *(hours, days)* in advance by telephone to all members.

Section 4. _____ members of the Corporation, plus at least _____ officers shall constitute a quorum at any general membership meeting.

ARTICLE VI.
Board of Directors

Section 1. The affairs of the Corporation shall be managed by its Board of Directors.

Section 2. The number of Directors shall be _____ and comprised of the following: *(list composition of Board)*. Members are elected for a _____-year term or until their successors are elected. Directors are elected at the _____ meeting.

Section 3. A regular meeting of the Board of Directors shall be held on *(day of week and relation to month, e.g., first Tuesday)* at *(time--a.m. or p.m.)* at the _____ Volunteer Rescue

Squad building. Additional regular meetings shall not be held without notice other than by resolution by the board. The Board shall meet at least *(weekly, monthly, or quarterly)*.

Section 4. Special meetings of the Board of Directors may be called by the Chairman or upon the written request of *(number)* members of the Board. The purpose of the meeting shall be stated in the call. Except in cases of emergency, at least *(amount of time)* notice shall be given. Notice of all special meetings shall be made to the Directors in writing and mailed to their home address, except in the case of an emergency when the notice may then be given by telephone at least *(amount of time)* in advance to all directors.

Section 5. *(Number)* Directors shall constitute a quorum at any Board of Directors meeting.

Section 6. The Board of Directors is responsible for, but not limited to, assuring that the Corporation is accountable to the citizens of the community; preparing and enforcing the policies and procedures of the Corporation, managing the assets of the Corporation; overseeing the Corporation's fundraising activities; developing a long-range plan for the Corporation; developing goals and objectives for the current year; evaluating program effectiveness and Board effectiveness annually; preparing an annual budget; declaring vacant, for sufficient cause, any Board seat; and performing all other duties prescribed by these Bylaws.

Section 7. The Board may not take action which is contrary to these Bylaws and amendments thereto. *(List any other limitations unique to your squad.)*

Section 8. The Board of Directors, except as otherwise provided in these Bylaws, may authorize any officer or agent to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation, and such authority may be general or confined to a specific instance. Unless so authorized by the Board of Directors, no officer, agent, or employee shall have any power or authority to bind the Corporation by any contract or engagement, or to pledge its credit, or render it liable pecuniarily for any purpose or to any amount.

Section 9. The Board shall monitor the expenditures of the Corporation to assure that expenditures do not exceed specific line items or the total budget. Authority to exceed any line item or the total budget may be granted by a majority vote.

Section 10. The Corporation shall have the right to retain all or any part of any securities or property acquired by it in whatever manner, and to invest and reinvest any funds held by it, according to the judgement of the Board of Directors, without being restricted to the class of investments which a director is or may hereafter be permitted by law to make or any similar restriction. No action shall be taken by or on behalf of the Corporation if it is a legally-prohibited transaction or would result in denial of tax-exemption under the applicable sections of the Internal Revenue Code and its Regulations as they now exist, or as they may be amended.

ARTICLE VII.
Standing Committees

Section 1. The Nominating Committee shall be appointed by *(whom)* in *(month)* of each year. The Committee shall consist of not less than _____ nor more than _____ members in good standing who are not currently officers of the Corporation. The Nominating Committee shall be responsible for preparing a slate of qualified officers and directors which shall be presented at the _____ Meeting.

Section 2. The Committee on Discipline shall be responsible for the arbitration of discipline of members of the Corporation upon suspension by an officer. The Committee on Discipline shall be

comprised of a chairman appointed from the _____, and *(number)* members in good standing, drawn at random from the rolls of the corporation.

The Committee on Discipline shall convene a hearing, unless such hearing is waived by the member against whom a complaint has been lodged, within _____ days of the suspension. It shall be the responsibility of the Committee on Discipline to hear all evidence pertaining to the complaint and to render a recommendation as to the discipline appropriate to the complaint. A written report shall be submitted to the _____ within *(timeframe)* of the Committee on Discipline trial.

Any member disciplined under this process shall have the right of appeal to the _____, provided that such appeal is made in writing to the _____ at least *(amount of time)* prior to a regularly scheduled meeting of the _____.

Section 3. *(List and describe all other standing and/or advisory committees, their method of selection, and duties.)*

ARTICLE VIII.
Finances

Section 1. No part of the net earnings or assets of the Corporation shall inure to the benefit of, or be distributable to its members, except that the corporation shall be authorized and empowered to make expenditures or distributions for the members in furtherance of the purposes of the corporation.

Section 2. The Corporation shall not participate in, nor intervene in *(including the publishing or distributing of printed materials or statements)*, any political campaign on behalf of any candidate for public office.

Section 3. The Corporation shall maintain in the State of _____ a registered office and a registered agent of the Corporation.

Section 4. No member of the Board of Directors, Corporation *(general membership)*, paid staff, or member of any authorized committee or members of their immediate family may engage directly in business transactions with the Corporation for personal gain. Business transactions may be considered with a business which employs members or their immediate family, or in which a member holds stock or has other interests, providing the member(s) states a conflict and that statement is made part of the meeting proceedings. Members who have a potential conflict of interest are not authorized to vote on such matters.

Section 5. Notwithstanding any other provision of these Bylaws, no director, officer, employee, member, or representative of this Corporation shall take any action or carry on any activity by or on behalf of the Corporation not permitted to be taken or carried on by an organization exempt under Section 501(c)(3) of the Internal Revenue code and its Regulations as they now exist or as they may hereafter be amended.

Section 6. The Corporation shall pay expenses incurred by, or satisfy a judgement or fine rendered or levied against a present or former director or officer of this Corporation in an action brought by a third party against such person, whether or not the Corporation is joined as a party defendant, to impose a liability or penalty on such person while a director, officer, or employee or by the Corporation, or by both; provided, the Board of directors determines in good faith that such person was acting in good faith within what he reasonably believed to be the scope of his employment or authority and for a purpose which he reasonably believed to be in the best interests of the Corporation. Payments authorized herewith include amounts paid and expenses incurred in settling any such action or threatened action. The provisions of this Section shall apply to the estate, executor, administrator, heirs, legatees,

or devisees of a director, officer, or employee, and the term <u>person</u> where used in this Section shall include the estate, executor, administrator, heirs, legatee, or devisees of such person. This Section does not apply to permit indemnification for gross negligence or willful misconduct.

ARTICLE IX.
Parliamentary Authority

The rules contained in the current edition of <u>Robert's Rules of Order, Newly Revised</u> shall govern the Corporation in all cases to which they are applicable and in which they are not inconsistent with these Bylaws and any special rules of order the Corporation may adopt.

ARTICLE X.
Dissolution

Upon dissolution of the Corporation, all of its net assets shall be distributed to such charitable and educational organizations, as described in Section 501(c)(3) of the Internal Revenue Code and similar sections of future laws, as the directors in their sole discretion shall determine. No such person or persons shall be entitled to share in the distribution of any of the corporate assets upon the dissolution of the Corporation.

ARTICLE XI.
Amendment of Bylaws

These Bylaws may be amended at any regular meeting of the Corporation by a two-thirds vote, provided that the amendment has been submitted in writing at the previous regular meeting.

CORPORATE STRUCTURE AND STATE LICENSURE

This chapter reviews information and forms necessary for the squad to incorporate and obtain IRS tax-exempt status and Virginia EMS agency licensure. It is generally wise to obtain the services of an attorney when you pursue incorporation and tax-exempt status.

After the squad is incorporated, it will need a registered agent. A lawyer would be a good choice because members of rescue squad boards of directors and/or their officers may change annually or even more often. The likelihood of losing information, particularly the annual renewal forms is fairly high for some rescue squads if their registered agent is a member of the squad. (However, a squad member may serve as the registered agent.) You might take care of this by requesting the services of an attorney whom you have recruited as a member of the agency. In this case, perhaps there will not be a charge for services, or the charge will be minimal. The other choice is to request the services of an attorney who is not an agency member but is willing to be a registered agent and help the squad from time-to-time with legal matters. You can help reduce attorney's fees by offering to complete as many of the forms as possible and asking only for a final review and processing of documents.

INCORPORATION

To incorporate or not to incorporate is an agency decision. Generally, incorporation moves liability from individuals to the agency. This reduces or eliminates the financial burden on individuals and their personal possessions if the agency should fail or experience a successful law suit. Although law suits against EMS agencies are relatively few, the protection incorporation offers members is worthwhile. Another advantage to incorporation is the availability of tax-exempt status.

Disadvantages of incorporation are few. They include potential legal fees for an attorney's service, initial fees to the State Corporation Commission (SCC) and the local clerk of the court, renewal fees to the SCC, and the time required to pursue incorporation.

To begin the process of incorporation, the organization will need to develop Articles of Incorporation. These articles are rules contained in a corporation charter issued by the SCC. They set forth legal agreements with the squad for protection of the name, property, and membership liability. The organization is responsible for developing these articles and for forwarding them, along with initial fees, to the SCC and local clerk of court. (See p. 19 for a reprint of a "Guide for Articles of Incorporation - Non-Stock Corporation" and instructions for submitting the article and fees provided by the SCC.)

TAX-EXEMPT STATUS

Incorporated, nonprofit EMS agencies are probably eligible for tax-exempt status under Section 501 (c) (3) of the Internal Revenue Code. Only the IRS can determine if an agency is tax-exempt, and this is done on an agency-by-agency basis. There is no ruling that all rescue squads are exempt. Form 1023, <u>Application for Recognition of Exemption</u>, and its instructions (both found in Package 1023) are necessary to initiate the determination process. Other helpful documents are Publication 557, <u>Tax-Exempt Status for Your Organization</u>, and Form SS-4, <u>Application for Employer's Identification Number</u>. Call the IRS toll-free number 800-424-3676 to request forms.

Form 1023, which may be obtained from a tax accountant or the IRS, is multipurpose. It is the basis for a ruling on whether the organization is tax-exempt under 501 (c) (3), serves to notify the IRS

that the organization is applying for recognition of exempt status, and, finally, notifies the IRS that the organization is not claiming to be a private foundation. Being designated a federal tax-exempt agency does not exempt the squad from all forms of taxation. For example, if you are an employer, you are responsible for the employer's share of withholding taxes. Unrelated business income may be subject to taxation. An example might be ownership of rental property, an area that has been changing rapidly over the past three years. Seek professional advice from an accountant or lawyer familiar with tax-exempt and nonprofit issues if the squad has unusual sources of income.

Along with Form 1023, send a copy of the squad's Articles of Incorporation (after approval by the SCC) and a copy of the bylaws. Every attachment to Form 1023 must show the date completed, organization name, address and Employer ID number. If the organization does not have an Employer ID number, a completed SS-4 Form must also be included. (The employer ID number is frequently abbreviated FIN for federal identification number.)

Parts I through VI of Form 1023 must be completed. In Part I, line 7, the correct activity code for an EMS agency is 158 which refers to "Rescue and Emergency Service." In Part VI, A, check Box 4 if the EMS agency is a defined entity which receives a substantial part of its support from a government unit or Box 7 if a substantial part of support comes from the general public. An attorney's opinion is valuable in regard to this. If Box 7 is checked, then Part VI, B, must also be completed. Fortunately, EMS agencies do not need to complete Schedules A-G.

When Form 1023 is complete, send it and all necessary attachments to the appropriate district office. For Virginia, this is: Internal Revenue Service, EP/EO Division, P. O. Box 17010, Baltimore, MD 21203. The IRS will notify the organization of its determination and the annual returns it will be required to file. If the IRS rules that the organization has not proved a case for tax-exempt status, the squad can appeal the decision.

IRS nonprofit designation has limited meaning to the U. S. Postal Service. If the squad desires a nonprofit mailing rate for use with large mailings such as a direct mail fund drive, apply directly to the Postal Service. Some nonprofits are not eligible for a nonprofit mailing permit. A rescue squad, however, appears to meet the postal service requirements. The local post office can supply application forms.

STATE LICENSURE

All agencies that intend to perform either emergency or non-emergency transportation of ill, injured or handicapped persons in Virginia are subject to the Rules and Regulations Governing Emergency Medical Services. Agency licensure is required by the Department of Health. The Rules and Regulations, application forms, copies of civil and criminal laws related to EMS in Virginia, and other pertinent information, can be obtained by writing the Division of EMS, Virginia Department of Health, 1538 East Parham Road, Richmond, VA 23228, or calling toll-free, 800-523-6019 (Virginia only).

Two forms necessary to initiate EMS licensure:

1.   Agency Application: Includes general agency location and descriptive information, along with identity of the official representatives and medical director. Mail this completed form to the Division EMS Office.

2.   Agency Roster: Includes personnel information for certified technicians and support personnel. Mail the completed roster to the Division EMS Office or give it directly to the program representative who will inspect the agency.

When the criteria are met, and EMS vehicles are ready for operation (i.e., equipped, lettered and radios installed), the agency representative should contact the appropriate program representative (contact the Division EMS Office for name and telephone number) and request an inspection. The inspection will involve all vehicles to be licensed by the health department, agency quarters, medical equipment and supplies, medical storage and personnel records.

Anyone interested in obtaining licensure as an EMS agency should read the <u>Rules and Regulations Governing Emergency Medical Services</u> before proceeding with any other aspect of licensure. Agencies wishing to be licensed as advanced life support agencies should contact their regional EMS council for assistance.

CORPORATE AND TAX STRUCTURE RECORDS

Check List

In general, the squad leader should know exactly where these records are, how often they should be up-dated or reviewed, and have a designated person responsible for each.

[ ] Articles of Incorporation

[ ] 501(c) (3) status

[ ] Registered agent

[ ] Annual fees to the State Corporation Commission

[ ] Local clerk of court records

[ ] Any required annual IRS reports

[ ] Postal Service nonprofit mailing records

[ ] Agency licensure records

[ ] Letter or certificate to operate from the local government

[ ] Proof of vehicular insurance

COMMONWEALTH OF VIRGINIA
STATE CORPORATION COMMISSION
Clerk of the Commission
P. O. Box 1197, 1220 Bank St., Richmond, VA 23209

GUIDE FOR ARTICLES OF INCORPORATION - NONSTOCK CORPORATION

ARTICLES OF INCORPORATION OF
___(Name of Corporation)___

The undersigned person(s), pursuant to Chapter 10 of Title 13.1 of the Code of Virginia, hereby execute(s) the following articles of incorporation and set(s) forth:

ONE
The name of the corporation is ___(see S13.1-829 of the Code of Virginia)___.

TWO
The corporation is to have no members. OR
The corporation is to have the following class(es) of members:

_____

_____

[Set forth any provisions which the incorporators choose to include in the articles of incorporation designating the class(es) of members, stating the qualifications and rights of the members of each class, and conferring, limiting or denying the right to vote. If so provided in the articles, such provisions may be included in the bylaws (see S13.1-837 et seq. of the Code of Virginia).]

THREE
A statement of the manner in which directors are to be elected or appointed (see S13.1-853 et seq. of the code of Virginia).

FOUR
The post office address, including street and number, of the initial registered office is ___(Number and Street)___ ___(City or Town)___, VA _(Zip)_, which is located in [the City or the County (USE APPROPRIATE PHRASE)] of _____.

FIVE
The name of the initial registered agent is _____, [who is a resident of Virginia and (an initial director of the corporation) (a member of the Virginia State Bar)] [which is a professional corporation registered under the provisions of S54-42.2 of the Code of Virginia], and whose business office is identical with the registered office (USE APPROPRIATE PHRASE(S)).

SIX
The names and addresses of the initial directors are (required only if an initial director is the initial registered agent):

_____

INCORPORATOR(S):

_____

_____	_____
(Signature(s))	(Printed name(s))

INSTRUCTIONS

1. The law requires that the articles be typewritten or printed in black. White, opaque paper 8 1/2" by 11" must be used. A minimum of a 1" margin must be provided on the left, top and bottom margins and 1/2" on the right margin. Use only one side of a page. A manually signed photocopy may be filed; a photocopied signature is unacceptable.

2. With respect to the registered office: Provide the complete post office address, which must include a street address or rural route and box number. Provide the name of the city or county where the office is located. No city in Virginia is part of a county, although some cities and counties have the same names.

3. The initial registered agent must be either (i) an individual who is a resident of Virginia and an initial director or a member of the Virginia State Bar or (ii) a professional corporation registered under the provisions of S54-42.2 of the Code of Virginia. The business office of the agent must be identical with the registered office (see S13.1-833).

4. A corporation can have directors immediately upon formation only if they are named in the Articles of Incorporation. Thus, if a director is to serve as the initial registered agent, directors must be included in the Articles.

5. SEND THE ARTICLES ALONG WITH ALL FEES TO THE CLERK OF THE COMMISSION.

FEES

1. Make check payable to STATE CORPORATION COMMISSION: Charter fee - $50.00; Filing fee - $10.00; Recording fee - $10.00 if articles contain 4 pages or less (add $2.00 per page in excess of 4) - $70.00 (minimum).

2. Make check payable to CLERK OF COURT where the registered office is located (this fee is not required if the office is located in the City of Richmond or the County of Henrico): Recording fee - $10.00 if articles are 4 pages or less (add $2.00 per page in excess of 4); Certification fee - $2.00 - $12.00 (minimum).

NOTE

1. This form contains the minimum number of provisions required by law to be set forth in Articles of Incorporation of a nonstock corporation. Additional provisions can be included to suit the needs of a particular corporation.

2. Most nonprofit, tax-exempt corporations are organized as nonstock corporations. Information and advice about tax exemptions are not available from the State Corporation Commission. Contact the Internal Revenue Service, an accountant, a lawyer or other professional of your choice with regard to such matters.

RISK MANAGEMENT

This chapter focuses on legal issues within the framework of risk management; that is, acknowledging the legal environment, accepting the burdens it places upon squads, reducing the risk of exposure, insuring those exposures that remain, and containing the costs.

It is important to recognize that the judicial system is a mechanism for solving grievances in the United States. Legal action occurs because of a grievance, a belief on the part of the person bringing suit that he or she has been harmed and that the squad or a squad member is at least partially at fault.

Because suits begin with belief, not necessarily fact, it is critical that rescue squads devote time to risk management. Those who believe they are protected by virtue of being a volunteer or by the presence of the Good Samaritan Act are gambling. They have placed their bets on the belief that they will never be sued. If they are the officers of the rescue squad, they are gambling with the future of the organization and the welfare of its members. On the other hand, the non-gamblers are those who believe that they could be sued tomorrow and have taken steps to ensure that their defenses are in place, including the finances necessary for legal fees.

REDUCING RISK

There are three elements to risk management:

❶   Identifying risks.
❷   Eliminating preventable risks.
❸   Purchasing insurance to provide financial protection from unpreventable risks, or deciding to accept those risks.

In general, rescue squads have risks in the following areas:

1.   Operations: From the tasks involved in the provision of emergency medical care.
2.   Vehicle operations: Same as any other owner and operator of a motor vehicle, with the added risk of operating under emergency conditions.
3.   Financial: There are accepted ways to handle the stewardship of public funds and the squad must adhere to them.
4.   Membership: Members must be treated fairly and without discrimination and provided with a safe environment in which to perform their tasks.

You may reduce risks in each of these areas by establishing written policy. The policies must be reasonable, within the law, and in keeping with generally accepted standards. Provide copies of the policies to every member and review the policies annually--deleting, adding and revising, as necessary. Every member without exception must adhere to the policies as written, and corrective action must be taken for policy violations.

Squad members sometimes sue their own organizations for the same reason that outsiders do-- they have a grievance. Disregarding a growing level of discontent or dissatisfaction by simply calling it "squad politics" is not a wise thing to do. If "squad politics" is an increasing concern, consider a major revision of all squad policies. Use an open method that allows every member an opportunity to be heard.

If you are sued, you are placed in a your-word-versus-theirs position, and it isn't clear whom the jury will believe. Written policies are part of the defense, along with the Good Samaritan Act and well-

written incident and call reports. The person suing you will be in court with expert witnesses and all kinds of records proving you were at fault. You need to be in court with your expert witnesses and your records proving that your actions were reasonable.

Do not confuse defense with immunity. Being an advocate for your patient, adhering to state standards, having good written policies, legislation such as the Good Samaritan Act, and good documentation are defenses, not immunity.

Much of the advice of this manual is risk management advice. When you are advised to do police record checks on new members, have an auditor review the books every year, spread financial tasks among several members or keep files of every member's training, you're getting risk management advice. These are the tasks you perform to prove that what you do is what any reasonable person would do, and that if something goes wrong, it could not have been prevented and you cannot be held at fault.

In general, it would be difficult to defend yourself in these areas:

❶ Violation of the law.
❷ Any unreasonable action, action taken for personal benefit, or action that fails to meet standards in Virginia.
❸ Equipment failure.
❹ Allowing incompetent people to perform.

If you are sued, you are placed in a defensive position. Unfortunately, people or organizations who are sued are always losers because they must take on the financial burden inherent in defending themselves. The person suing (or plaintiff) will pay his or her lawyer a percentage of what is won from you. So, it doesn't cost the plaintiff anything "up front". On the positive side of this, frivolous suits are prevented because a lawyer will not take a case that can't possibly be won. So if you are served with legal papers --beware, some lawyer thinks that he or she has a case against you. Regardless of whether you win or lose, you--as a defendant--will have to pay legal costs. The cost of defense and having the case thrown out before you go to court may be tens-of-thousands of dollars.

INSURANCE

A squad must purchase insurance because it cannot completely eliminate all risks. Insurance represents a defense fund for legal fees if necessary and a fund for paying damages, either before or after court action. (Many insurance policies such as vehicle insurance and workman's compensation pay damages without court procedures, and, in fact, by making restitution, keep one out of court.) Consider the following types of insurance:

❶ Businessowners: To protect against the financial burden of theft or damage to building and equipment.
❷ Vehicle insurance: To provide liability and comprehensive coverage for transport carriers.
❸ Workman's compensation: In the event a squad member is injured on duty.
❹ Directors and officers: To protect those who make policy decisions.
❺ Professional and general liability: For all members.

Virginia has a law that limits liability for directors and officers to the extent of their salaries. In other words, if squad leaders are not paid, their liability is zero. Like the Good Samaritan Act, this law does not exempt you from suit, it merely becomes part of the defense. If the budget limits the types of insurance the squad can carry, it is probably better to eliminate insurance for directors and officers than any other category of insurance.

Not purchasing insurance is gambling that the squad will never be sued. Purchasing insurance is knowing that the squad could be sued tomorrow. In many cases, local government will help purchase insurance or may even be willing to cover the squad in one of its policies.

SUMMARY

Being sued can be devastating to a volunteer rescue squad. It can destroy the morale and finances of an organization. Remember, however, that the person bringing suit feels equally devastated for some reason. Perhaps a child was lost or the use of a limb, or limbs, was lost. The person may not care that the squad is a volunteer agency donating its time for the good of the community. So, it is important that you be prepared to cope with these situations. Only Superman and Superwoman are invincible.

At the same time, the legal structure in the United States should not be so frightening that a person does not want to volunteer. Very few suits have ever been brought against a volunteer rescue squad in Virginia. If members perform ethically, always placing the patient's benefit ahead of other considerations, institute solid management practices and insure unacceptable risks, they should feel reasonably comfortable in being part of a rescue squad.

RISK MANAGEMENT

Check List

[ ]   Identify risks.

[ ]   Eliminate preventable risks.

[ ]   Insure unacceptable risks.

[ ]   Adhere to state and regional standards in patient care.

[ ]   Adhere to state standards in vehicle operations.

[ ]   Institute generally acceptable accounting practices in the management of funds.

[ ]   Establish routine equipment maintenance programs.

[ ]   Keep back-ups for broken equipment and repair all equipment within a reasonable time.

[ ]   Establish written personnel and operational policies.

[ ]   Ensure a safe working environment.

[ ]   Treat all members fairly and without prejudice.

[ ]   Keep complete and accurate records.

[ ]   Do not tolerate incompetency.

FINANCIAL MANAGEMENT

Sound financial management assures that EMS members will be able to provide emergency care. Concentrate on budgeting and accounting (or bookkeeping) first because they provide information to support fundraising, investments, cost containment and grant-seeking programs.

As you review financial management activities or consider changing current approaches, keep in mind these important standards which apply to all nonprofit agencies:

1. If you accept or solicit public funds (local government, Two-For-Life, private contributions, bingo, etc.), you accept stewardship of those funds. This means you are accountable to the general public and have an obligation to let them know how the funds are used. This obligation extends across all revenues and is not limited to a particular gift or category of funds.

2. The members of the board (or, if you do not have a board, the general membership) have a moral and legal responsibility for financial management. Individual members can be held personally liable for financial mismanagement.

3. Unwillingness to release financial information will almost always be perceived as an attempt to hide mismanagement, regardless of whether or not it was intentional. The burden of proving that funds are used appropriately falls on the squad.

BUDGETING

For most rescue squads, the line item budget is the best type to use. A squad may want, however, to supplement its line item budget with one or more small program budgets for special activities such as the annual Christmas party.

Prepare the annual budget on a one-year basis, but also include a budget in the long-term agency plan. The long-term budget and last year's expenditures will provide the information you need to prepare a one-year budget. The annual budget should reflect the squad's plans. For example, if you are planning a direct-mail fund drive for the first time, the budget should show increased costs in the printing and postage expenditure line items, and increased revenue in the fund-drive line item. The budget should be approved by the membership prior to the beginning of the budget year.

A budget is a financial plan that outlines anticipated revenues and expenditures. It can be changed although it has been adopted. You have no control over many changes that affect the budget (e.g., increased fuel costs, reduced revenues from the fund-drive); however, you should evaluate any changes to see if they indicate a need to budget differently. For example, if the vehicle insurance premium doubled this year, you should seek quotes from other firms.

All squad members need to help raise funds and make decisions about how the funds will be spent. It is important, however, to avoid free-for-all spending sessions or, at the monthly business meeting, excessive argument over minor expenditures. To avoid these situations, consider establishing a budget month. During this time, have members create "wish lists" and make suggestions for projects and purchases they think worthwhile. Compile the suggestions and consider them during budget preparation. After the squad approves the budget, avoid spontaneous purchases. Address anticipated needs, but avoid luxuries if they are outside the approved budget.

Sample #1 Line Item Budget
(Dollar figures are for illustration only.)

Revenue

151	Local Government	25,000	
152	Two For Life	800	
153	Contributions	9,000	
154	Memorials	4,000	
155	Bingo	15,000	
156	Annual Fund Drive	22,000	
157	United Way	4,500	
158	CPR Course Fees	500	
159	Rescue Squad Assistance Fund	20,000	
160	Interest Income	2,500	
	Total		103,300

Expenditures

301	Rent	10,650	
302	Telephone	300	
303	Office Supplies	150	
304	Legal and Accounting	1,800	
305	Freight and Postage	200	
306	Building Maintenance and Repair	1,000	
307	Printing and Photocopy	200	
308	Outside Services	200	
309	Office Repair and Maintenance	200	
310	Library	400	
311	Dues and Subscriptions	800	
312	Advertising and Promotion	100	
313	Businessowners Insurance	400	
314	Entertainment	1,800	
315	Office Equipment	600	
	Subtotal, 300s General Operating		18,800
401	Gasoline	10,000	
402	Vehicle Insurance	2,000	
403	Vehicle Maintenance and Repair	8,000	
404	Vehicle	40,000	
	Subtotal, 400s Vehicle Expense		60,000
501	Gross Wages	None	
502	FICA	None	
503	Fringe Benefits	None	
	Subtotal, 500s Personnel Costs		None
601	Training Fees	2,000	
602	Textbooks	1,500	

Sample #1 Line Item Budget (continued)

603 Conferences	3,000	
604 Travel	800	
605 Training Equipment	2,000	
Subtotal, 600s Training Expenses		9,300
701 Expendable Medical Supplies	4,000	
702 Medical Equipment Repair and Maintenance	4,000	
703 Medical Equipment	800	
Subtotal, 700s Medical Supplies and Equipment		8,800
801 Communications Insurance	400	
802 Communications Repair and Maintenance	3,000	
803 Communications Equipment	3,000	
Subtotal, 800s Communications		6,400
TOTAL		103,300

Excess/Deficit Revenues over Expenditures — -0-

Sample #2 Line Item Budget
(Dollars figures are for illustration only.)

	FY 87	FY 88
Assets - Trust Fund	40,000	34,400
Revenue		
Local Government	20,000	25,000
Donations and Grants	46,000	8,000
Fund Drive	20,000	22,000
Interest	800	800
TOTAL	86,800	55,800
Capital Expenditures		
Ambulance Purchase	40,000	-0-
Land Purchase	-0-	12,000
TOTAL	40,000	12,000
Operating Expenditures		
Insurance	8,000	12,000
Gasoline	12,000	14,000
Office 6,000	6,500	
Repair and Maintenance	4,000	4,800

Medical Supplies	8,000	10,000
Training	4,000	6,000
Medical Equipment	4,000	4,000
Communications Equipment	1,800	1,400
Outside Services	2,200	2,600
Travel and Entertainment	1,800	2,000
Dues and Subscriptions	600	700
TOTAL	52,400	69,000
Excess/Deficit Revenues over Expenditures	34,400	9,200

PROJECT BUDGETS

You may write special project or program budgets either as part of the initial budget or at some time during the year. In general, prepare such a budget to track costs and benefits of a separate activity (e.g., the annual fund drive), if you are trying a new project (e.g., citizen CPR programs), or you need information about a specific activity (e.g., social activities or membership incentive programs).

Sample Project Budget

Annual Christmas Party

Revenue

Guest fees (20 @ 15.00)	300
Donation (annual from Dr. Jones)	100
TOTAL	400

Expenditures

Dinner	375
Invitations	40
Band	800
Decorations	150
Postage and Telephone	40
Flowers	75
Awards	125
TOTAL	1,605
Excess/Deficit Revenues less Expenditures	<1,250>

This budget will show in the line item budget as a single expense under entertainment, along with the spring picnic and fall dance. The Entertainment Committee will know only how much money the rescue squad has approved to spend during the year on entertainment. Its task is to implement all social activities without going over the budget.

The type of budget choice will depend on how much information you need or how closely you need to tie the budget to squad activities. The first sample budget is detailed, a must for agencies that

have a small amount of funds for unexpected expenses or for agencies with a large number of different types of donors and contributors to whom to report. The second sample budget combines many small items into larger single categories. For example, in the second budget sample, rent, postage, telephone, photocopy and office supplies are all combined into a single category called office. A simplified budget provides much less information. Thus, if office expense doubled in the past year, you would have to look at the transaction journal to determine the cause. This is a time-consuming process.

ACCOUNTING SYSTEM

An accounting system is an organized way of recording and reporting financial transactions. It will help you to track how well you are following the budget. It will also provide information on which to make decisions about purchases and to report the squad's financial condition to its membership and contributors.

Select a system that meets generally accepted accounting principles and works for the squad. Many squads use a cash accounting system which records revenues and expenditures when they are actually deposited or paid.

The first thing to do in establishing an accounting system is to decide on a fiscal year and an accounting cycle, and develop a chart of accounts. A fiscal year for most squads runs from July 1 until June 30 (typical of local governments), from January 1 until December 31 (the calendar year), or from October 1 until September 30 (the federal fiscal year).

The accounting cycle is a period less than a year. During that period, all transactions are accomplished and a report is issued. Many agencies use a monthly accounting cycle. At the end of the month, all bills should have been paid, all checks and cash deposited, the bank accounts balanced, and a report submitted to the membership. During the accounting cycle, accomplish these tasks:

❶ Deposit funds.

❷ Write checks.

❸ Enter all deposits (credits) and payments (debits) in a transaction journal, a chronological listing of each transaction.

❹ Balance (or reconcile) the journal.

❺ Post journal entries in the general ledger. This places those same transactions in order by account.

❻ Balance the general ledger.

❼ Balance the monthly bank statements.

❽ Prepare report to the membership.

The chart of accounts lists the types of funds collected and the types spent, with a number assigned to each. Each type is called an account. When setting up a chart of accounts, you will save time and reduce confusion if you use exactly the same accounts as the line items in the budget.

Sample Chart of Accounts

Classification	Account Number	Account Title
Current Assets	101	Cash in Bank
	102	Inventory
Fixed Assets	150	Ambulances
	151	Depreciation
	152	Furniture
	153	Office Equipment
	154	Communications Systems
	155	Land
	156	Buildings
Revenue	161	Local Government
	162	Two For Life
	163	Contributions
	164	Memorials
	165	Bingo
	166	Annual Fund Drive
	167	United Way
	168	CPR Course Fees
	169	Rescue Squad Assistance Fund
	170	Interest
Expenditures General Operating	301	Office Supplies
	302	Legal and Accounting
	303	Freight and Postage
	304	Rent
	305	Telephone
	306	Building Maintenance and Repair
	307	Printing and Photocopy
	308	Outside Services
	309	Office Equipment Repair and Maintenance
	310	Library
	311	Dues and Subscriptions
	312	Advertising and Promotion
	313	Businessowners Insurance
	314	Entertainment
	315	Office Equipment
Vehicle	401	Gasoline
	402	Vehicle Insurance
	403	Vehicle Maintenance and Repair
	404	Vehicle

Personnel	501	Gross Wages
	502	FICA
	503	Fringe Benefits
Training	601	Training Fees
	602	Textbooks
	603	Conferences
	604	Travel
	605	Training Equipment
Medical Supplies	701	Expendable Medical Supplies
	702	Medical Equipment Repair and Maintenance
	703	Medical Equipment
Communications	801	Insurance -- Communications
	802	Communications Repair and Maintenance
	803	Communications Equipment

Divide accounting tasks among several individuals. For example, have the secretary collect mail and sort bills, the president approve payment of all bills and write checks, and the treasurer deposit money and sign checks. The purpose of dividing tasks is to prevent opportunities for mismanagement of funds, or in the worst case, to prevent theft. How tasks are divided may vary, but always have more than one person involved in the accounting process. Many agencies add oversight to the system by using checks that require two signatures.

WAYS TO SIMPLIFY BUDGETING AND ACCOUNTING

1. Recruit a member solely for financial management. A local bookkeeper or accountant might be willing to donate his or her time for this purpose.

2. Consider the services of a bookkeeping firm that specializes in small businesses or nonprofit agencies. Common services include setting up a chart of accounts and a check-writing system, provision of monthly and quarterly operating statements, provision of year-end statements that include all assets, balancing bank statements, and preparation of the annual income tax return. Systems set up by firms often eliminate the need for a squad to have a general ledger and provide their own type of transaction journal. For a small squad (less than 30 checks per month), a bookkeeping service should run around $100.00 per month.

3. Contact a local chapter of the United Way, League of Older Americans or a Voluntary Action Center to see if they can find a volunteer willing to do the squad's financial management.

AUDIT

Have an independent firm audit or review the books on an annual basis for these reasons:

❶   To confirm that stewardship of public funds is within reason.

❷   To provide advice on improving the financial management system.

❸   Many agencies that provide grants, or corporations that make contributions, will require an independent financial statement as a condition for receiving funds.

You have several choices in selecting independent oversight. Common choices are an audit or a review of the books. An auditor will check a sampling of the transactions made during the year; a reviewer will check the general system for handling funds. Because of its increased detail, an audit is more expensive than a review of the books. In either case, a formal report that identifies assets, obligations, revenues and expenditures is the end product. In addition, you may request that the firm complete Form 990, required for nonprofit agencies that collect over $25,000 a year. (This is an information-only return, and you may not be required to pay taxes on the income generated.) You may select any firm to prepare the income tax return, or the squad's bookkeeping firm can provide the service. The formal audit or review should be done by a certified public accountant (CPA).

RECORDKEEPING

In general, you should keep financial records for at least seven years. Auditor's reports should probably be kept indefinitely as they can provide a quick, concise financial history of the squad. A financial recordkeeping system has three important elements:

❶   Transaction Journals

❷   General Ledgers

❸   Files

Keep files of budgets, reports, contracts, grants, bills, etc. Set aside a filing cabinet for this purpose. Lock it and issue keys to those with financial responsibilities only. The cabinet should always be kept at corporate headquarters (usually the crew hall), not at an individual's home. To set up the files, use a series of hanging files with labeled folders. Make a hanging file for each category (each account from the chart of accounts), with a tab identifying contents of the file. Place each item (or year) in a separate folder and label it. The following is a sample outline for establishing files:

Financial Filing System

1.	Articles of Incorporation	(hanging file)
2.	Tax-exempt Status	(hanging file)
	2.1 Federal 501(c)(3)	(labeled file folder)
	2.2 State	(labeled file folder)
	2.2.1 ST-12 forms	(labeled file folder)
	2.3 Gasoline Tax	(labeled file folder)
3.	Auditor's Reports	(hanging file)
	3.1 1985	(labeled file folder)
	3.2 1986	(labeled file folder)
	3.3 1987, etc.	(labeled file folder)

4.	Annual Budgets		(hanging file)
	4.1	1985	(labeled file folder)
	4.2	1986	(labeled file folder)
	4.3	1987, etc.	(labeled file folder)
5.	Operating Statements		(hanging file)
	5.1	1985	(labeled file folder)
	5.2	1986	(labeled file folder)
	5.3	1987, etc.	(labeled file folder)
6.	Transaction Journals		(hanging file)
	6.1	1985	(labeled file folder)
	6.2	1986	(labeled file folder)
	6.3	1987, etc.	(labeled file folder)
7.	Federal Tax Reports (990)		(hanging file)
	7.1	Instructions	(labeled file folder)
	7.2	1985	(labeled file folder)
	7.3	1986	(labeled file folder)
	7.4	1987, etc.	(labeled file folder)
8.	Grants and Proposals		(hanging file)
	8.1	1985	(labeled file folder)
	8.1.1	United Way	(labeled file folder)
	8.1.2	Rescue Squad Assistance Fund	(labeled file folder)
	8.1.3	Local Foundation	(labeled file folder)
	8.2	1986	(hanging file)
	8.2.1	United Way	(labeled file folder)
	8.2.2	Rescue Squad Assistance Fund	(labeled file folder)
	8.2.3	Local Foundation, etc.	(labeled file folder)
9.	Annual Revenue and Expenditure Reports		(hanging file)
	9.1	1987 (duplicate for each year)	(labeled file folder)
	9.1.1	Expenditures	(labeled file folder)

Establish a hanging file or something similar for each account in the chart of accounts. Put all bills/statements/invoices/insurance policies in these files. On each bill, note the date paid, amount and check number.

REVENUE

Most squads have revenue records in their transaction journal only. However, if your practice is to write receipts for each revenue transaction, you should establish a file for each revenue account in the chart of accounts. Add additional files as needed. File categories that you might want to add are planned giving records and annual fund-drive records. Keep all revenue records in a systematic order so that new officers and the auditor can easily understand them.

Always write receipts for cash, even if you cannot give the donor a receipt. Also write receipts for checks if you intend to have an annual audit. A photocopy of checks can be substituted for a receipt. If you already write a receipt for all checks and cash received -- don't stop, it is good financial practice.

COMMON MYTHS

Listed below are a few common myths about financial management and issues:

1.   Volunteer rescue squads cannot charge a fee-for-service. This is not true; volunteer agencies can bill patients. This practice is not common in Virginia, however, and many agencies object to this method of raising funds. Should you decide to consider fee-for-service, seek professional advice. (You don't want to jeopardize the squad's nonprofit status.)

2.   A volunteer rescue squad cannot make a profit. This is not true; nonprofit organizations are expected to raise funds. However, the profits are not shared among stockholders or partners as a return on investment. The profits generated by a nonprofit agency are to be spent in support of activities that state and federal governments recognize as acceptable. A financial balance at the end of the year is often perceived by contributors as good management. It may be less confusing to think of nonprofit agencies as tax-exempt instead of nonprofit. Tax-exempt organizations raise money, spend it on acceptable activities, and are not required to pay taxes on the funds raised.

3.   Funds should not be spent on social activities. This is not true. As long as the organization is comprised of volunteers, it is reasonable to invest in them. These expenditures are incentive expenditures, however, not compensation. For that reason, nothing is inherently wrong with budgeting for a dinner, picnic, watches for life members, free coffee in the building, and other types of rewards that encourage citizens to volunteer their time and service. You can get in trouble with these expenditures if they seem excessive in comparison to the budget or if you attempt to hide their existence.

4.   Accepting local or state government funds allows government to control the squad's operations. This is only partly true. Government will not give funds to an agency that violates the law, and if you accept government funding, an attempt may be made to use the funds to encourage compliance with the law (most common in the case of sex, race, age or occupational discrimination). For the most part, local government places great value on volunteerism and prefers to assist a volunteer group with its needs rather than provide the service. If there are problems with the service being provided by the rescue squad, local government may find it necessary to become involved. In this case, money is only one tool available, so simply refusing to accept government funding will not necessarily prevent government involvement. In general, the best course of action is to accept government funding if it is needed, report regularly about activities, always keep the mission of the rescue squad as first priority and maintain a good working relationship with elected officials and their staff.

SUMMARY

Financial management may seem like a tremendous amount of work. Actually, it is possible to keep the system relatively simple, and you **can** avoid much of the paper work by developing a system.

You may have noticed that purchase orders and other common financial forms have not been discussed in this chapter. These types of forms build accountability into a system and ensure that

unauthorized purchases are not made. Spend time on the budget, use it to direct purchases, and have it approved by the membership. Divide financial tasks among several officers so that no person has the entire financial responsibility. Develop a chart of accounts that matches the budget line items so that monthly or quarterly reports can be quickly written. Establish a filing system and keep copies of all receipts, bills,contracts, and reports. Finally, have an independent check of the squad's financial activity each year. Such tasks will help ensure that the rescue squad has the resources necessary to provide emergency care to the community.
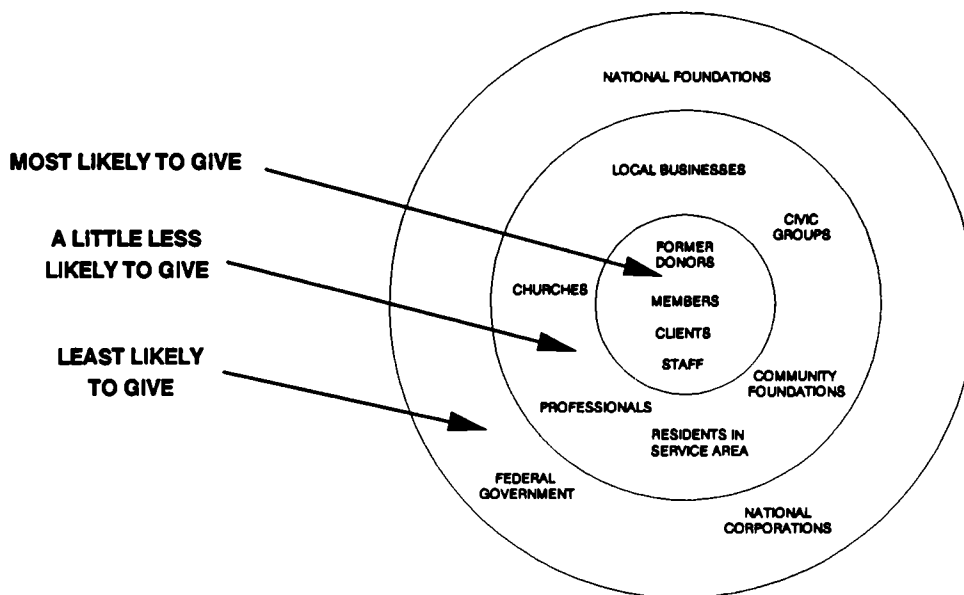

FINANCIAL MANAGEMENT

Check List

[ ]   Long-term budget (5 years +)

[ ]   Annual budget approved by membership

[ ]   Established fiscal year, accounting cycle and chart of accounts

[ ]   Reports by accounting cycle to the membership

[ ]   Accounting tasks divided between 2 or more members

[ ]   Established transaction journal and general ledger reconciled by accounting cycle

[ ]   Annual audit or review of the books by CPA

[ ]   Established filing system with limited access

[ ]   Receipts written for all revenue

[ ]   Form 990 filed annually with the IRS

FUNDRAISING

The success of a squad's future plans often depends on its ability to raise funds. The objective of this chapter is to review the primary ways funds are raised and to provide some ideas about new or additional fundraising activities. The graphic below provides useful information about people and groups that give.

MOST LIKELY TO GIVE

A LITTLE LESS LIKELY TO GIVE

LEAST LIKELY TO GIVE

NATIONAL FOUNDATIONS

LOCAL BUSINESSES

CIVIC GROUPS

FORMER DONORS

CHURCHES

MEMBERS

CLIENTS

STAFF

COMMUNITY FOUNDATIONS

PROFESSIONALS

RESIDENTS IN SERVICE AREA

FEDERAL GOVERNMENT

NATIONAL CORPORATIONS

VIRGINIA LAW

All charitable organizations operating in Virginia, including volunteer rescue squads, are required by the Virginia Solicitation of Contributions Act to register with the State Office of Consumer Affairs (OCA) prior to solicitation. This applies to any fundraising by mail, telephone or personal contacts. The Office of Consumer Affairs makes available to the public information on file about an organization. To find out if the squad is registered, call the Charitable Solicitations Section of the Office of Consumer Affairs, at 1-800-552-9963, or write Office of Consumer Affairs, Virginia Department of Agriculture and Consumer Services, P. O. Box 1163, Richmond, VA 23209.

If you are thinking about hiring a professional solicitor, call the number above and ask if the firm which the person represents is registered. The OCA can also tell you what percentage of the money collected by the firm will be returned to the squad, how much will be spent on actual costs and how much goes to salaries of the firm's employees. Firms not registered with the OCA, including rescue squads, may be in violation of state law.

PLANNED GIVING

There are eight types of planned giving:

❶ Memorials: The custom of honoring a friend or family member with a contribution. Build the solicitation of memorials into all squad promotional materials (brochure, fund-drive packet, annual report, etc.)
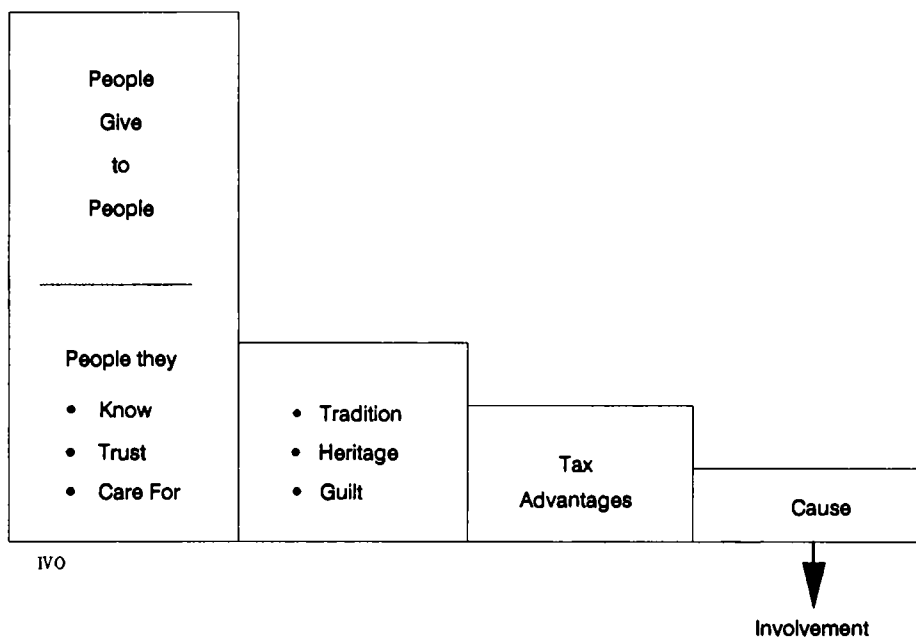
❷   <u>Bequests</u>: A gift made through a will. Seven percent of all U. S. charitable giving is through bequests. Promote bequests the same way you promote memorials.

❸   <u>Life Insurance</u>: The squad can be named as the receiver of death benefits, annual policy dividends, annuity payments, maturing endowments and cash surrenders.

❹   <u>Charitable Trust</u>: Money or property given in trust to the squad in return for tax benefits and a fixed or percentage income for the donor's lifetime.

❺   <u>Charitable Gift Annuity</u>: Cash or securities given in exchange for a fixed amount of annual income and tax benefits.

❻   <u>Pooled Income Trust</u>: A trust formed with assets from several different donors. Each donor receives a pro rata share of the income.

❼   <u>Life Estate Contract</u>: Real estate donated in return for tax advantages and lifetime use of the property by the donor.

❽   <u>Securities</u>: Stocks and bonds donated in favor of reduced taxes.

If you are interested in an organized planned-giving program, consult a professional with expertise in that area. A well-organized plan will entail some expense and require expertise in estate planning and law, taxes and investment. The advantages of such a plan are that the gifts generally provide unrestricted income, increase community visibility, encourage increased giving and have the potential for producing regular income. Many experts consider planned giving the area of greatest growth in charitable giving.

THE ANNUAL FUND DRIVE

The annual fund drive is a financial mainstay for many volunteer rescue squads. Remember: Individual giving accounts for nearly 90% of all charitable contributions in the United States. A schematic of why people give and to whom they give is shown below:

<u>Why Do People Give?</u>

```
People
Give
to
People
────────────
People they

• Know          • Tradition
• Trust         • Heritage        Tax
• Care For      • Guilt           Advantages       Cause

IVO                                                         │
                                                            ▼
                                                      Involvement
```

William R. Conrad, Jr., Center for Creative Management, Downer's Grove, IL 60515.

An annual fund drive has three goals:

❶　　　to secure new givers

❷　　　to retain and upgrade present givers

❸　　　to reinstate former givers

There are three basic ways to ask for contributions: face-to-face, telephone, and direct mail. You may use all, a combination, or only one of the three.

Prospects for annual giving include individuals, corporations and businesses, foundations, United Ways, community funds, service clubs, associations, private clubs, and government.

Tips and Reminders for Annual Fund Drives:

1.　　　Scheduling: April, May, November and December are the best months for individual contributions. June is the worst. Use other months to seek funds from foundations and corporations. Spend at least as much time planning your campaign as the campaign will last. Don't have a campaign longer than six weeks if it is an annual event. If the annual fund drive is longer than six weeks, people will perceive that the squad's fundraising efforts continue all year long and the impact of a once-a-year event is lost.

2.　　　Consider and choose one or more of these techniques:

　　　　a.　　door-to-door canvas
　　　　b.　　phone-a-thon
　　　　c.　　direct mail
　　　　d.　　stationary canisters
　　　　e.　　special events (e.g., auctions, dinners)

3.　　　Recruit help from other groups (civic clubs, churches, schools) and issue challenges.

4.　　　Everyone is fair game.

5.　　　Provide orientation for solicitors.

6.　　　Check all local and state laws.

7.　　　Give receipts.

8.　　　Provide literature about the organization and the purpose of the fund drive.

9.　　　Keep records.

10.　　Say "Thank-you".

11.　　Dare to be different.

TYPES OF LOCAL GOVERNMENT SUPPORT

❶   In-kind Services: Use of city/county motor pools and gasoline pumps (or reimbursement for those costs); purchase of insurance or coverage under existing government policies; waiver of user fees for water and sewer.

❷   Incentives: Membership bonuses such as free city/county vehicle stickers and waiver of user fees at public beaches, golf courses and swimming pools.

❸   Operating Expenses: Cash contribution. Always fill out the forms provided and **always** get them in before the deadline.

❹   Capital Expenses: Inclusion of buildings or vehicle purchases as part of the government capital improvements program.

❺   Special Expenses: Support for special, one-time needs such as matching a Rescue Squad Assistance Fund award or providing Hepatitis B vaccination for members.

❻   Cost Sharing: Purchase of items such as office supplies, kitchen supplies, audiovisual equipment, communications equipment, janitorial supplies, computer equipment, and other supplies at reduced city/county rates.

THE UNITED WAY

Many volunteer rescue squads receive funds from their local United Way. If you are a member organization, this means you have agreed to limit individual fundraising in favor of group solicitation through the annual United Way Campaign. Member agencies are allocated money each year, the amount based on the decision of the United Way's review committee. An option some United Ways offer is for the squad to become a qualified non-member agency. Such agencies receive the funds a donor has earmarked for them, minus administrative fees charged by the United Way.

TWO FOR LIFE FUNDS

Twenty-five percent of all funds collected by the Commonwealth of Virginia from the $2.00 tax on annual vehicle registration is returned to local governments to support nonprofit EMS agencies. The legislature intended that these funds supplement the customary commitment of local government. Many pass the money directly to the rescue squads. Some have used the funds to hire consultants for communications improvements, pooled the funds and supported training programs through the regional EMS council, or actually funded a trainer in the regional office. If you are unaware of how Two For Life funds are being used in your locality, contact the local city manager or county administrator.

RESCUE SQUAD ASSISTANCE FUND

The Rescue Squad Assistance Fund (RSAF) is also funded through the Two For Life program. Nonprofit EMS agencies may apply for matching funds (either 50% or 80%) of project costs. Although most funding has been for equipment purchases, a proposal can be written for any worthy activity except operational expenses and hiring permanent personnel. Studies, research projects and consultant fees are examples of unusual, but eligible projects. A copy of the application, instructions and guidelines may be obtained from the Division of Emergency Medical Services. Deadlines for application are March 15 and September 15 of each year. Your regional EMS council is willing to help with application.

GRANTS

Grants are not easy money. Grant programs are generally very competitive, require expertise to write and manage, and are rarely renewable. They are, however, important income sources for many nonprofits. The most common types of grants are:

- ☞ Capital: Land, building, equipment.

- ☞ Challenge/Matching: Requires some funds from the organization.

- ☞ Conditional: Have some requirement or condition other than matching funds.

- ☞ Earmarked: Usually pass-through funds (e.g., a grant to a regional EMS council or local government on behalf of a rescue squad). Often established this way because the recipient lacks the financial or management expertise required by the granting agency.

- ☞ Endowment: Established to provide a regular income.

- ☞ Funding Crisis: Emergency needs.

- ☞ General Support/Unrestricted

- ☞ Research

- ☞ Seed: To start a new program or agency.

- ☞ Technical Assistance

The Rescue Squad Assistance Fund is generally a capital and challenge grant. Grants to regional EMS councils from state government are usually challenge and conditional grants; grants to regional EMS councils or states from the federal government are usually seed or conditional grants. Community organizations and local governments often give funding crisis grants. Five types of grantmakers are:

❶ Foundations   ❹ Government
❷ Corporations   ❺ Bank Trust Departments
❸ Community Organizations

You can learn who the grantmakers are by going to your local library and reviewing the Foundation Directory or the Foundation Index Bimonthly. (If you don't know much about writing grant proposals, also look for material from The Grantsmanship Center.) Specifically, check for groups that make grants:

❶ in your geographic area,
❷ related to your purpose, and
❸ in your dollar range.

Look for grantmakers with a history of funding health care, human service or community organizations. Follow the instructions in the Directory related to when and how you should contact the foundation.

All grants require a proposal. If you need proposal-writing help, contact the regional EMS council, local planning or community development office, voluntary action center or any squad member who writes or manages grants for a living.

PROPOSAL WRITER'S GUIDE TO GOOD CENTS

Begin all grant proposals with a summary letter outlining purpose, background, amount requested, and time frames. The body of a good proposal will contain the following elements and answer the following questions:

I.   CLEAR STATEMENT OF WHAT IS TO BE ACCOMPLISHED

*What is the purpose of the project?
*How long will it last?
*What is the importance of the problem addressed?

II.   PRIORITY OF THE PROJECT

*Is there a demonstrated need for the project?
*Why does this project deserve aid more than others competing for funds in the same field?
*Who will benefit from this program? How?
*Is this a new approach? Has a similar project succeeded? Failed? Why?
*What immediate and long range results are expected?

III.   FINANCIAL SECTION

*What is the current operating budget of the organization?
*What is the projected budget breakdown for the program: salaries, benefits, rent, travel, telephone, etc.?
*Will the project continue beyond the funding period? How?
*What plans are there for eventual self-support of programs or alternative sources of funding?

IV.   BACKGROUND INFORMATION

*How long has the organization been in existence?
*What are the organization's prior and current projects?
*Is the organization tax-exempt [501(c) (3)]?
*Does the proposed project have the support of the organization's board of directors, trustees, or advisors?
*What is the relationship of the project to overall goals of the organization?

V.   PERSONNEL

*How would you describe (briefly) positions and corresponding duties?
*Who are the current staff members and what are their professional qualifications?
*Who are the board members and how are they representative of the people to
be served?
*Will additional staff be required and for what duties?

VI.   EVALUATION

*How will the success or failure of the project be measured?
*What evaluation techniques will be used and who will undertake them?

SPECIAL EVENTS

Special events are both over-rated and under-rated. They are over-rated because they will never provide for all your operating needs, and they are hard work. They are under-rated because they can provide valuable community exposure that in turn can help your fund-drive, United Way donations or planned giving programs. Special events may be incorporated into the annual campaign or you can hold them at other times of the year.

Relatively common special events include:	
Steak suppers	Car washes
Bake sales	Open houses
CPR or other marathon	Raffles
Turkey shoots	Yard sales or auctions
Fairs, festivals, carnivals	Car shows
Donkey basketball	Road Rallies
Concessions at events	Dances
Road blocks or net drives	Athletic tournaments

A few new or not-so-common special event ideas follow:

1. Gift Catalogs: A list of all the things you need and a request to donate that item.

2. Coupon Books: A list of all the things you need with a price attached. Donors return the coupon of their choice with check for that amount.

3. Art Auctions: Local artists donate their work.

4. Slave Auctions: Auction services, labor, dates.

5. Local Social Events: Many areas have local festivals, concerts in the park, or community parties. If the event is sponsored by local government on behalf of nonprofits, see if you can get on the list. Some sponsoring groups make the concession booths available to nonprofits first.

6. Limited Raffle: Sell a limited number of tickets at highest cost for an expensive item (e.g., 1,000 tickets at $100 each for a house, land or a car).

7. Trade-Up: Get a local radio station to sponsor your effort. Offer an item for trade such as a quilt. Ask people to call in with a trade-up. The quilt for a camera, then the camera for a bicycle, then the bicycle for a canoe, then the canoe for a VCR, etc., until you reach an item of acceptable resale value.

8. Cookbooks

9. Follies, Talent Shows, Beauty Contests, Pet Shows

10. Photo Contest and Sale

11. Bridge or Backgammon Tournaments

12. <u>Shop and Share</u>: Get a local business to donate a percentage of gross sales to the rescue squad over a set-time period (e.g., 5% of sales for 3 days). Promote the event!

13. <u>Pro-Am Tournament</u>: If you have local tennis, golf or other sports professionals, see if they will donate their time to an event.

14. <u>Wine or Chocolate Tasting</u>

15. <u>Casino Night</u>

16. <u>Door Prizes</u>: At squad meetings, Christmas Party, social events, etc., offer a lottery ticket at a set price, or auction the item. Invite local government, VAVRS, regional council and other officials to your party!

17. <u>Ice Cream Social</u>: Sell homemade ice cream.

18. <u>Celebrity Auction</u>

19. <u>Chinese Auction</u>: All items are donated and numbered. A bowl is placed in front of each item and bids are written on a slip of paper and placed in the bowl. At a set time, one bid is drawn from the bowl and the bidder pays the price and receives the item.

SALES

Sales are common sources of income for many organizations, particularly youth groups. They are common because they are generally successful, but they are also time consuming and may not generate acceptable revenues for operations as extensive as rescue squads. Items that are often sold include candy, doughnuts, fruit cakes, calendars, candles, gift wrap, greeting cards, etc. The best way to get involved in this type of effort is to contact a firm that specializes in sales fundraising. If you don't know of any firms, check with the local high school coaches or student group faculty sponsors.

A variation on the sales method is to provide a product and have local retail stores sell the item for you. For example, you may arrange for a candy bar to be produced with the squad's logo and slogan on the wrapper. Then you ask your local grocery and drug stores to stock the item and collect the funds for you. Firms that specialize in fundraising, or a marketing agency, can help with these types of sales programs.

BINGO

Bingo is a major income source for many volunteer rescue squads. It does, however, require a good deal of the membership's time, a suitable physical location, stringent financial controls and a market for the game. Those rescue squads that tell you they save lives and run bingo, but not necessarily in that order, are giving you a real insight into the commitment that a successful bingo operation requires.

If you want to consider bingo as an income source, first check the local area to see how many groups are involved in bingo. Visit their games; see if you can get financial reports from them. If there are lots of bingo operations, and your visits indicate that they aren't busy, then perhaps there are already too many in the area and the squad's time would be better invested elsewhere. If the market for bingo looks fairly good, check all state and local laws regulating the game. For advice on operations, equipment purchase, and necessary facilities, the best source of information is another rescue squad that has had a successful operation for at least two years. The regional EMS council can put you in touch with a squad that has bingo operations.

FEE FOR SERVICE

Fee-for-service means that you bill the patients, and this is a permissible practice unless a local ordinance prohibits it. Very few Virginia localities have local franchise ordinances (Virginia Beach is one that does), but you should know before you establish fee-for-service.

In general, most insurance companies and the federal government reimburse for ambulance service; however, you cannot bill Medicare patients or patients with insurance only. Billing policies must be nondiscriminatory. Occasionally, we hear about a patient who requests a bill so he or she can collect the insurance funds and donate them to the rescue squad. This is so rare that the requests always make a good story. Many squads believe that billing for service reduces donations. There is no known proof for this. On the other hand, there is no known disproof either, and it does seem likely that citizens who are billed would not donate. It is unclear what citizens who have not used the service would do. Each rescue squad has to balance its financial needs against its ability to raise funds and select the method most likely to succeed. Billing is one possible option.

Billing requires establishment of a system to keep track of patients, invoices and payments. The squad has to decide how to set fees and what to do about delinquent accounts. Several books provide extensive information on billing systems. We suggest, Beyond the Street: A Handbook for EMS Leadership and Management, by Joseph Fitch, Jems Publications, 1988.

SUBSCRIPTIONS

A subscription service is similar to a fee-for-service. It allows the squad to sell a subscription which entitles the holder of the subscription to service. Subscriptions are for an established time such as one year, two years, lifetime, etc., and are usually sold to a household rather than an individual. Subscribing households are entitled to unlimited use of the service during the subscription period. Households that do not subscribe are billed for each use of the service. To make this system work, the subscription has to offer significant savings over the cost of being billed. All the disadvantages of the fee-for-service arrangement are inherent in the subscription arrangement. The advantage of the subscription is that the squad generates some revenue in advance.

COST CONTAINMENT

Cost containment refers to increasing revenues by reducing expenses. To do this, you will need good financial records so you can examine each area of expenditure and then investigate ways of reducing costs in the line items you believe are too high. The most common method of cost containment is to examine the cost of equipment and supplies. Are your technicians writing patient information on 4 X 4s instead of notepads? Is the company from which you order supplies giving you the best deal? Can you save money by ordering once a year in bulk? Are you taking advantage of all hospital exchange programs? Are your ambulances overstocked? Are you stocking items that nobody ever uses? These are the kinds of questions you should ask about any line item. In general you want to make sure of the following:

☛ We purchase only what we truly need and use.

☛ We purchase the least expensive brand possible without sacrificing the quality we desire.

☛ We are using the least expensive, best service supplier.

☛ We take full advantage of all bulk purchase and prepayment discounts.

- We take advantage of joint purchase opportunities made available to us through local government, VAVRS and our regional EMS council.

- We take advantage of all discounts and reimbursements for which we qualify, including exemption from sales and gasoline taxes.

- We purchase from state contract when possible.

- We take full advantage of hospital exchange programs without abusing those programs.

- We have complete, accurate inventories and signed receipts for all equipment issued to members. We recover all issued equipment when a member leaves the organization.

- We investigate all fee reductions for telephone, public utilities and vehicle maintenance and petition local government for exemption, when appropriate.

- We encourage and accept in-kind gifts of needed items in lieu of cash donations.

UNSOLICITED DONATIONS

An unsolicited donation is one the squad receives that is not in response to a specific request for funds or materials. Because a rescue squad is so visible in the community, unsolicited donations are not uncommon and come most often from a patient who has used the service, or from the family of a patient. Unsolicited donations are particularly beneficial because they are usually unanticipated revenue, and are received without a specific fundraising cost. They make members who were on the call feel good.

To increase unsolicited donations, leave a business card with every patient, and send a service evaluation to each. The evaluation reminds the patients that they used your service, gives them an opportunity to let you know if they were satisfied, and, since you have enclosed a return envelope for the evaluation, makes it easier for them to send a check to the right place.

Get organized to send thank-you notes and keep records of unsolicited contributions, just as you do for the annual fund drive. Be sure to post on the bulletin board all thank-you notes that come with a donation so members can read and identify those who were on the call.

STATE AMBULANCE CONTRACT

The Virginia Division of EMS makes a state contract ambulance available to all EMS services in the Commonwealth. Under this system, the state writes bid specifications for a Type I, Type II, and Type III ambulance. The specifications are sent out to qualified vendors and the lowest bidder wins the contract. Rescue squads will be able to purchase the ambulance at the contract price. Of course, this means the squad is purchasing the contract ambulance; variations on cabinet work and other options may not be available or may cost extra. In general, the contract ambulance is less expensive than independent purchase of the same ambulance. For more information on the state contract, contact the Division of EMS at 1-800-523-6019.

COST SHARING AND SURPLUS GOODS

Cost sharing generally refers to an alliance with other groups for the purpose of making bulk purchases of the same items at reduced rate benefits. Many people join professional associations for just this reason. For example, the National Association of EMTs offers discount rates on magazine

subscriptions, educational events and malpractice insurance. Many regional EMS councils and the VAVRS keep stocks of items such as EMT patches or PHTLS pins which can be bought in bulk only. Textbooks are also items for which there are significant savings if bought in bulk. You need to watch prices, however. A nonprofit agency may raise the purchase price to cover the expense of having an inventory; therefore, purchase from these groups may be easier, but not cheaper.

State contract items are essentially those discounted by the vendor in return for the privilege of supplying all state agencies. Rescue squads are eligible to purchase from state contracts, and you should contact the local city or county financial administrator for help with this. Rescue squads are also eligible to purchase state and federal surplus goods. The state has several surplus depots where you can examine what is available. Your city or county financial administrator can also assist you with the forms you need to purchase surplus goods. Try to arrange with the financial administrator to get first choice (after local government offices) for local government surplus items before they are auctioned to the general public. Local businesses will often donate surplus goods if they know you have a need. Establishing a gift catalog can help you get this information to businesses. Be sure to include routine items like cleaning supplies and light bulbs.

BUSINESS SUPPORT

Businesses are often the weakest link in the fund-raising strategies of rescue squads. They have more resources, however, and more to gain by supporting local service to organizations. Here are a few tips to help you work with businesses:

☛ <u>Avoid a form letter</u>. A better method is to make an appointment and speak to a manager in person. Follow up the meeting with written information about the project. Use the squad's letterhead for this. If form letters must be used (due to numbers), make copies clean and clear and then sign each by hand.

☛ <u>Sell yourself and your cause</u>. Be professional when meeting business representatives. Arrive prepared with background information regarding the project. Plead your case. Why should this business donate to **you** and **your program** instead of another?

☛ <u>Business cards work</u>. Leave a business card at an interview or enclose one in your correspondence. Many businesses will keep the card on file and remember you better and longer.

☛ <u>Don't ask for something-for-nothing</u>. (1) Indicate that you will promote their business in your community and emphasize how many community people buy in their store, use their services, etc. (2) Show how the squad is trying to help itself through creative approaches to fundraising. (3) Indicate how other businesses are supporting the project and stress the importance of cooperation among businesses, agencies, schools, etc.

☛ <u>Indicate knowledge of the business</u>. Let the company know you are aware of donations they have made in the past and the support they have lent to other projects. **Stroke** the business manager for his or her past efforts!

☛ <u>Remember names</u>. If you want business people to remember you and the squad's programs, then it is wise to learn well their names and their business background.

☛ <u>Thank you's and follow up</u>. Write a letter of appreciation immediately upon receipt of a donation. Correspond with benefactors to update them on the result of a special event they supported or of progress of an ongoing program. This personal touch may mean the difference in the squad's acquiring future support from the company.

☛ Special recognition. Award "Service to Community" certificates when practical, and provide recognition to benefactors at large community events, in programs, and in displays. Special gifts can be impressive to businesses (e.g., framed copies of newspaper coverage of the event or the program brochure listing the name of the business.)

☛ Keep files. Be organized, and maintain names, addresses, items or services donated, dates, etc., in "resource file" for future use.

☛ Repeat requests. Many businesses are flattered when asked to sponsor events on a regular basis if they are treated with appreciation and enthusiastic respect by the squad coordinator. However, beware that you do not overdo a good thing and exhaust their resources. Think carefully before you approach a business with a request. Be always aware of what the business has done for you in the past.

☛ Discouraged? You may have to make 15 calls on business managers before you increase donations. However, that 15th person may put you on the trail of three solid benefactors. Know from the start that business solicitation is "chancy" and most definitely a challenge, but it can make or break your fund-raising program. Most would agree it is well worth the effort.

From "Fundraising and Soliciting Business Support" (with minor modifications), distributed by the SNAP Support System, 1017 Avon Street, Flint, Michigan 48503.

FUNDRAISING

Check List

[ ]   Are we in compliance with the Virginia Solicitation of Contributions Act?

[ ]   Do we have a long-term budget and know our long-term financial needs?

[ ]   Do we have an annual budget and know our financial needs for this year?

[ ]   Are current contributions meeting our needs?

[ ]   If yes, can we reduce the time and effort spent to generate the same amount of funds?

[ ]   If no, how can we raise additional funds?

[ ]   Do we have the historical records of contributions necessary to target those individuals most likely to give?

[ ]   Review categories of fundraising listed in this chapter. Select options most likely to work for you.

[ ]   Do we have adequate records to review the success of different fund-raising approaches used in the past?

[ ]   Do we need outside assistance with fundraising?

ORGANIZING THE MEMBERSHIP

A rescue squad must have people to accomplish its mission, and it must make available to them the tools (training, equipment, supplies) necessary to get the job done. This chapter reviews some basic management practices related to keeping people organized and committed to the rescue squad and its work.

WHY VOLUNTEER?

THE VOLUNTEER EMS SYSTEM IS NOT DEAD! More than half the EMS agencies in the United States are volunteer dependent. As local governments face the increasing cost of providing public services, they are not likely to be in any hurry to replace a volunteer EMS system that is meeting community needs.

In 1987, the J. C. Penny Company funded a National Survey of Volunteers to obtain information that would encourage corporate support for volunteerism and volunteer recruitment. The findings provide information of value in planning a recruitment program.

The study revealed that the vast majority of people volunteer because they want to help others (97%) and they enjoy the work (93%). Other responses were as follows:

Work interesting	89%
Feel responsibility to volunteer	76%
Someone I know asked me	59%
Have free time	41%
To make new friends	40%
To get job experience	15%
Employer encourages volunteerism	14%
Required for membership in organization; academic responsibility	10%
To get freebies	7%

The principle reasons given for not volunteering were lack of time (79%) and concern over not being able to honor the commitment (40%). Other reasons are given below:

Health/physical problems	20%
No interest in volunteering	19%
Government should provide service	16%
Don't know how to get involved	12%
Age--too young/too old	12%
Concern about legal liability	11%
Don't have necessary skills	8%
People should be paid	7%
Too costly	7%

THE EMS VOLUNTEER

Recent research on the volunteer EMS system indicates that EMS volunteers tend to be young, less than 40 years of age. They are employed in areas considered to be white collar. Only one-third of the sample surveyed were female, and only three percent were minorities. Women and minorities continue to be vast untapped resources that the volunteer EMS system needs to cultivate.

The EMS system contains many elements which would seem to make a person want to volunteer: opportunity to help others, the work is interesting, new friends are made, marketable skills are developed, and a sense of belonging evolves. On the other hand, requirements for time to pull duty (more than 50 hours per month for EMS volunteers), maintain the building, raise money, train, find other volunteers, etc., may keep some people from volunteering.

THE RECRUITMENT PROGRAM

Too often volunteer EMS agencies tend to practice effortless recruitment, i.e., wait for members to come to them. When the squad does get new members, the recruits may be forced to "sink or swim" if management practices are lacking. This means volunteers may leave before they have a chance to become productive, and the agency's membership roster begins to look like a revolving door.

Inadequate numbers of volunteers coming into the system is frequently blamed on regulations, training standards and other factors. Still, the real shortage of EMS volunteers today is due to the persistent "effortless recruitment" and a resistance by volunteer agencies to rethink how they manage and motivate volunteers.

All recruiting efforts begin with a sound recruiting plan which helps guide the squad and its membership toward the same goals. The plan identifies jobs that need to be filled, the types of volunteers needed, and how to find the volunteers. A recruitment plan can be divided into three components: job identification, job descriptions, and recruiting effort.

Job Identification. Don't fall into the trap of thinking that you need volunteers only to ride the ambulance. Think about all jobs that make the squad run smoothly; e.g., working bingo, recruiting, building and equipment maintenance, filing, and recordkeeping. Many squads still believe their volunteers must be able to do <u>all</u> jobs, including riding on the ambulance. This way of thinking may ultimately cause you to lose some of the volunteers. By separating jobs, the squad can reduce time demand, reduce the dissatisfaction of having members perform tasks they may not particularly like, and increase participation by allowing volunteers to concentrate on jobs they do like.

Job Description. For each job, write a description that will help the volunteer know what is expected of him or her. Well-developed job descriptions can help prevent misunderstandings. The descriptions don't have to be complicated, but should provide basic information such as the following:

❶   **Title.** Don't try to create a fancy, complicated title. Keep it simple and try to say exactly what the job is.

❷   **Job tasks.** List all tasks required to complete the job.

❸   **Length of commitment or time commitment.** If the job is temporary, say how long the work will last. If it is ongoing, describe how much time per week or month is required.

❹   **Line of responsibility.** Give the name of the person to whom the volunteer staff member will report.

❺   **Skills or qualifications.** List the skills and/or qualifications necessary to do the job. It is IMPORTANT to include whether or not the squad will provide necessary training (e.g., EMT class).

EMERGENCY MEDICAL SERVICES VOLUNTEER

SAMPLE JOB DESCRIPTION

Job Title: Volunteer Prehospital Provider

Purpose: To provide responsible pre-hospital emergency care to clients.Promote and advance the squad's goals through training, fundraising, public education and community well-being.

Responsibilities: To devote adequate time and support to agency objectives; respond to emergencies, training, and public education projects. Actively participate in organizational functions: business meetings, training sessions and other special activities, as required by the squad.

Time Required: Weekly duty shifts, special details (unit and building maintenance), and meetings (business, training and committee) as required. Required to spend additional time during the initial probationary period to become familiar with the work of the squad.

Qualifications and Special Skills: Complete

- A minimum of 18 years of age or a person of mature judgement as attested to by the EMS agency.

- Clean and neat in appearance.

- Of sound physical and mental condition, capable of performing all assigned duties.

- Able to read, write and speak the English language.

- Not addicted to the use of any drugs or intoxicating substances.

- Never convicted of a felony involving any sexual crime.

- Never convicted of any other act which is a felony under the laws of this State or the United States, except that such felon is eligible for EMS certification if no additional felonies have been committed within five (5) years after the date of final release from incarceration.

- Required training program during probationary period.

- Other requirements as imposed by the agency.

Supervision: Provided by line officer(s) and/or designated members.

Benefits: Upon successful completion of probationary period or its equivalent, volunteer pre-hospital provider may become a full member of the squad with all responsibilities and privileges accorded by the agency. Special recognition and awards may be achieved.

Evaluation: A performance evaluation will be conducted at least annually by the line officers.

Recruiting Efforts. A recruiting plan should give careful consideration to the type of person needed for each job and where that person might be found. The local community college, for example, probably would not be the place to find someone interested in cleaning the crew hall. You might, however, find many interested and valuable volunteers for bingo, filing, recordkeeping, etc., at a retirement center. Volunteers come from all walks of life. Think about the type of people needed and what would attract them to the squad--then go after them.

The most successful recruiting programs are those in which members recruit new volunteers "face-to-face." One way to implement such a program is to conduct an annual "each-one-reach-one" recruiting drive. The squad member who recruits the most new members wins a weekend or some amount of time at a nice resort or other vacation spot for him/herself and perhaps a family member. This type of program costs surprisingly little yet provides huge benefits for the squad.

Other types of personal appeal also work well, e.g., a speaker at PTA, Rotary Club, and other civic meetings to promote the squad, inform the public and recruit members; and displays at malls and health fairs to "grab" people's attention as they walk by.

Make available to members a simple brochure that identifies the squad's mission, requirements for membership and how to apply, and the rewards of being a member. If the message is short, the brochure can be used as an enclosure in fund-drive packets and thank-you letters. Handing out a business card with the squad's name, logo, contact number and a message that welcomes new volunteers; and giving promotional items such as a key chain, magnet or small first aid kit are also good strategies. The basic idea is that: when someone expresses an interest, the recruiter should follow-up immediately by giving the person something as a reminder of the contact. Developing recruitment tools should be part of a recruitment plan.

Consider recruitment programs which are an investment for future volunteers; for example, "exploring." This program provides an excellent opportunity for the squad to teach volunteerism to young men and women and train future members for the squad.

Expensive advertising campaigns, mass mailings, public service announcements, and other media campaigns seem to have less success than personal appeals, and cost more. These types of programs are less likely to target specific groups of potential volunteers, but they can be useful and should not be ruled out as a recruiting tool.

Be prepared to place and train new volunteers as soon as they become members. Most new members are accepted into rescue squads on a probationary basis, but it is important to remember that the organization is also on probation. While you are learning if those individuals will make good members, they are deciding if the organization meets their personal needs. It is critical that the recruitment plan address this "honeymoon" period. Items to include in the plan are the development of an orientation packet for the new member to take home (include items like a copy of the bylaws and a membership roster), checklists for what the new member is to learn and do during the probationary period, and information about a "buddy" or mentor for each new member. If the squad issues patches, pagers, building keys, uniforms or other items to members, be sure to have plenty in stock. It doesn't make the new recruit feel wanted by the organization if everyone else has these things, but there aren't enough for him or her. It is also extremely important that the plan include a method for getting the new member trained. There is nothing that hurts a program more than to bring in a new, enthusiastic member who finds that it will be a year before the next EMT class is held. Even if it will be a year, have a plan for getting the person into CPR, vehicle extrication and EVOC classes.

Making a new member feel a productive part of the squad family will promote longer membership tenure. Accepting new members only to let them fend for themselves without any support will result in the loss of potentially good members.

KEEPING MEMBERS

Place equal importance on finding new volunteers and retaining existing ones. Inability to keep volunteers is sometimes more of a crisis than attracting new ones.

Like recruiting new volunteers, motivating existing ones requires some insight into what keeps volunteers happy. Research suggests that EMS volunteers leave the service primarily due to internal conflict and demanding role requirements. Obviously, some members leave because of changes in their lifestyle and loss of interest in squad work. These occurrences are inevitable. The squad has some control, however, over conflict within the organization and too many role requirements. Internal conflict is largely due to inadequacies in management practices.

To keep volunteers, the squad must be aware of such basic needs as the following, and then strive to meet these needs.

To feel part of the decision-making process. Volunteers function best when they get to help make decisions. This means more than just an opportunity to vote on an issue in a squad meeting. Include volunteers in planning sessions and committee work and ask how they feel about issues or problems about which decisions must be made. Let them know their input is important.

To feel appreciated. Be generous with praise. Consider distributing a squad newsletter which contains a section that thanks a member or members for a job well done. Send the local newspaper announcements of elections or information about special recognition of squad members. Volunteer appreciation days are very effective, but demonstration of appreciation should be constant.

To have a sense of responsibility and authority. When a volunteer is given a job, make sure he/she has the authority to make decisions. Properly trained, and with clearly written policies and procedures, the volunteer will be able to do the job within the framework and policy of the squad and have a sense of pride in the work.

To do interesting work. Most EMS work is interesting. The challenge is to make small jobs interesting. Stuffing fund-drive envelopes, for example, can be made into a social event. Recruiting new members can be made more interesting by having a contest. Use imagination and make all jobs interesting.

To have an opportunity to grow. Provide personal growth opportunities for members. A committee member, for example, might move into a leadership role within the committee structure. Challenge members with new jobs, larger tasks, and an opportunity to influence decisions.

To have effective supervisors. Volunteers should be able to feel that the supervisors believe in them and respect the value of their contribution to the squad. Squad supervisors should have training in how to work effectively with volunteers.

To have a safe working environment. The squad building should be a place where the volunteers are comfortable and safe, a place they can be proud of.

To have constructive evaluation. Despite what one might believe, volunteers do like to know how they are doing. This means consistent and fair performance evaluations. Evaluations help determine the motivational climate of the squad. Supervisors should be trained to do evaluations.

Motivating a group is equally as important as motivating an individual. Challenge, recognition, and reward are the critical elements of a good volunteer program. If the immediate objective is to stimulate a group, "challenge its members." If the objective is to provide continuous stimulation, then provide recognition and rewards. There are six basic methods for motivating any volunteer work force:

❶ Provide a challenge.
❷ Provide quality training--reinforce teamwork.
❸ Develop a team concept--team projects.
❹ Tell them they can't--reverse psychology.
❺ Make them special.
❻ Provide for group recognition.

A primary way to maintain volunteers once their basic needs are met is to provide incentives. Incentives can be as creative as one's ability to perceive the challenge, but must be appropriate for the agency and members. The incentive must be meaningful to be successful. Consider the following list of potential incentives:

- Awards banquet
- Reimbursement for educational/training programs
- Reserved parking
- Annual performance evaluations
- Recognition letter--if possible, sent to employer
- Business cards
- Preferential seating--during meetings, training sessions
- Skills challenge--between duty teams, etc.
- Discounts, freebies with merchants, etc.
- Paid insurance--at least workmen's compensation
- Uniform, clothing--remember you are marketing the agency
- Service awards--5 year/10 year, etc.
- Seasonal parties--Halloween, Christmas, EMS Week
- Athletic teams--bowling, softball, swimming
- Committee assignments
- Clothing reimbursement--cleaning allowance
- Training roster/number of calls displayed
- "Outstanding Member Award"
- Life insurance/liability insurance
- Athletic standbys
- Appointed positions within agency
- Display board with pictures of members
- Slide show demonstrating importance of volunteers
- Birthday cards for member and family
- Letter of recommendation to potential employer
- College credit for training programs
- Pins, plaques, and jewelry
- Opportunity to be a leader of the organization
- Scholarships
- EMS magazine subscriptions
- Retirement programs
- Fitness center discounts
- Reimbursement for educational conferences
- Bumper stickers
- Member of the month recognition
- Squad coffee mugs with each member's name
- Framed membership certificates

KEEPING TRACK OF THE MEMBERS

Ask any rescue squad officer how many members the squad has and the response will be: "How many members or how many active members?" Having inactive members isn't necessarily bad, particularly if they do not cost anything and do not get in the way of the job being done. But, if the squad has 20 people who answer all the calls, serve as officers, clean the equipment and run the fund drive; and 50 people who come to the meetings to vote on how the money is spent, then squad leaders have to decide if members are rewarded for being active or some are being encouraged to sit back and let others do the work.

One way to avoid having large numbers of inactive members, or--for that matter--the loss of some members, is to keep track of what they are doing. Start by establishing a personnel file for each member or probationary member.

Contents of personnel file:

❶ Completed application form
❷ A volunteer statement of commitment; the member also gets a copy
❸ Personnel record form. This form contains information generally not appropriate for inclusion on an application form since it should not be used in deciding whether or not an individual may become a member.
❹ Annual personnel update. This is the place to keep track of attendance, participation and special efforts of each member.
❺ Individual training records.
❻ Volunteer performance review
❼ Exit interview. Every member who leaves the organization should be given an exit interview to determine why he or she is leaving.

A sample application form and samples of other personnel forms are included at the end of this chapter. Personnel files should be kept at the organization's main office and be accessible only to approved officers of the organization. Members should be allowed to review their files at anytime, however, copies of any file item(s) should be made available upon request.

Good personnel files are necessary for leaders to keep track of what each member is doing. With this information, they can ensure that members receive recognition for their work. They can also begin to ask questions of those who are inactive or quit. Maybe those members just hate the business meetings or don't like their duty assignments. Such problems can be resolved if you know about them.

Keeping personnel files and performing exit interviews are so time consuming that a rescue squad should have a personnel officer. After all, many squads have vehicle and/or equipment officers, and the people are certainly as important as the equipment.

COMMUNICATING WITH MEMBERS

There are many ways of communicating. In fact, there are so many that we often feel overloaded with the sheer volume of information received. In spite of this, an overwhelming complaint from EMS agencies and individuals is that they didn't know that their card had expired, a class was starting, it was their duty night, etc. The endless complaints probably indicate that squads are not using their communication tools well.

The Business Meeting. The business meeting is the single most important communication tool available to the volunteer rescue squad. It has two goals: to inform members and to make decisions. These goals are fundamental in keeping members active in the organization, and the meeting should be treated as an important event.

The following is a list of essentials for business meetings:

Every member knows time and place of the meeting.

☛ The place is appropriate, comfortable, quiet, and large enough for the entire group.

☛ Minutes are taken at each meeting. Copies of the minutes of the previous meeting are made available at least 10 days in advance.

☛ The meeting follows a preset agenda. It may be the same agenda each time or it may vary.

- Individuals who are to report are prepared. If major decisions are to be made, adequate copies of pertinent information (e.g., price quotes) are available.

- Individuals who provide information updates at each meeting should be aware of the scope of their responsibilities. For example, the training officer should not only report on the monthly squad training session, but also on any course announcements received from the regional EMS council, VAVRS, and the Division of EMS. Remember, the goal is to inform the members.

- The presiding officer maintains control of the meeting, ensures that every member is heard and keeps the meeting moving.

- Individual members must inform the presiding officer in advance of major issues to be addressed at the meeting. This is a courtesy, and it may have impact on the agenda.

- Meetings begin and end on time. This also may require amendments to a typical agenda if a major decision requiring much discussion is before the group.

- Remember the meeting goals--to inform members and to make group decisions.

SAMPLE BUSINESS MEETING AGENDAS

Sample #1

1. Call to order
   Confirm the presence of a quorum
2. Approval of minutes of last meeting
3. Treasurer's report
4. Officer reports
5. Committee reports
6. Unfinished business
7. New business
8. Adjourn

Sample #2

1. Call to order
   Confirm the presence of a quorum
2. Approval of the minutes
3. Treasurer's report
4. Membership action
5. New ambulance purchase
6. Completion of building construction project
7. Fund-drive plans

If time permits:

8. Officer reports
9. Committee reports
10. Unfinished/new business
11. Adjourn

The thing to remember about setting the agenda for a business meeting is to get the important decisions made in a timely fashion. If the meeting calls for the election of officers or an important purchase, for example, put those "action" items early in the agenda. Items that do not require action can be scheduled after the important decisions are made.

If the meetings run consistently over-time, you might want to consider having informational reports submitted in writing, and give each member a copy. This is more time consuming for the officers or committee leaders who must prepare the report, limits the opportunity for questions, and denies an individual the chance to report. On the other hand, meetings must be controlled, and if they have become events that the membership would prefer to avoid, consider changing the way the meeting is structured.

Other Communication Tools. Other common communication tools are newsletters, magazines and announcements from other organizations. Handling this flow of information is critical. The person (or persons) who collects and distributes the mail of the organization is the key link. The squad should have clear policies on how mail is to be distributed; for example, all training announcements to the training officer, bills to the treasurer, unspecified mailings to the vice president, catalogs to the chairman of the equipment committee, etc. All officers and committees should have mailboxes. Ideally, all members should have a box.

A log-in system and place to store all packages received should be established. There is nothing more frustrating than to learn that your EMT books arrived three weeks ago and somebody put them under the bed. The squad should have a literature rack for magazines and newsletters. Bulletin boards should be established for official squad information, training information and personal notes, comics and pictures of the last call. The secretary should be responsible for ensuring that other organizations (VAVRS, local government, the regional EMS council) have the squad's current mailing address and a list of officers after each election. The cardinal rule in dealing with the mail is to remember that every member should have the opportunity to be informed. If the mail collector throws everything away, get a new collector!

Some rescue squads are so committed to keeping their members informed that they have an internal newsletter. Usually, it would include reminders about training, social and stand-by activities; personal notes about birthdays, illnesses, births; items about members who have been recognized in some way; and, highlights from business meetings or committee work. Internal newsletters take a lot of work but represent a true commitment to keeping every member actively involved and knowledgeable about the organization.

VOLUNTEER STATEMENT OF COMMITMENT
EMS

As a member of the _____ Volunteer Rescue Squad, I hereby make a commitment to:

1. Give _____ hours per month.

2. Attend membership meetings as scheduled.

3. Attend training sessions as scheduled.

As a member, I understand that I am a part of the staff of the _____ Volunteer Rescue Squad and therefore, I can be asked to resign from membership. Causes for dismissal from the volunteer staff include:

1. Failure to comply with the bylaws of the organization.

2. Failure to comply with the policies and procedures of the organization.

3. Failure to complete the required training programs; for example:

   a. EMT
   b. EVOC
   c. CPR
   d. Others as required by the agency

4. Failure to work minimum time per month over a period of _____ months.

5. Failure to attend inservice training programs over a period of _____ months.

6. Breach of confidentiality.

7. Unethical behavior.

8. Unwillingness to follow the directions of the officers.

As a volunteer, I am also required to provide evidence of:

1. Current Virginia driver's license and DMV driving transcript

2. Current certification from the Division of EMS

3. Copy of criminal records check, etc.

_____   _____
Signature of Applicant   Squad Officer

_____   _____
Date   Date

APPLICATION FOR MEMBERSHIP
EMS

Name_____

Nickname_____

Address_____

City/State _____ Zip Code _____

Home Phone_____ Work Phone_____

Employer_____

Address_____

City/State _____ Zip Code _____

Social Security Number _____-_____-_____

Date of Birth_____
            (month) (day) (year)

Where do you work/study?_____

How many hours per week?_____

Education level (circle last year completed)　　Grade 5　6　7　8

    High School　9　10　11　12;　College　1　2　3　4

    Graduate　　1　2　3　4　5;　Other Education_____

    Please list any other technical/professional degrees:

_____

PLEASE LIST THE FOLLOWING FOR EACH EMS AGENCY TO WHICH YOU HAVE PREVIOUSLY BELONGED OR BEEN A MEMBER:

Agency:_____

Position:_____

Dates of experience:_____

Agency/department supervisor: _____

Special training or certifications received:_____

Agency: _____

Position: _____

Dates of experience: _____

Agency/department supervisor: _____

Special training or certifications received: _____

_____

Agency: _____

Position: _____

Dates of experience: _____

Agency/department supervisor: _____

Special training or certifications received: _____

_____

Please list any other professional or volunteer experience which may be helpful in your position as a Volunteer EMS Provider:

_____

_____

_____

_____

_____

Special training, skills or interests: _____

_____

_____

_____

_____

Restrictions that might/will affect your availability for volunteer work (family, work schedules, medical restrictions, etc.): _____

_____

_____

_____

_____

TIMES AVAILABLE FOR TRAINING/DUTY:

Monday	AM	PM	Hours	_____
Tuesday	AM	PM	Hours	_____
Wednesday	AM	PM	Hours	_____
Thursday	AM	PM	Hours	_____
Friday	AM	PM	Hours	_____
Saturday	AM	PM	Hours	_____
Sunday	AM	PM	Hours	_____

TIMES **NOT** AVAILABLE: _____

_____

_____

Where did you learn about this agency? _____

_____

_____

In case of emergency, notify:_____

Relationship: _____

Physician: _____

Please attach copies of the following to this application:

1.   EMS certifications (issued from state agency)

2.   DMV driving transcript

3.   Parental/guardian permission slip (if under 18 years of age)

Please provide the following information for five (5) people who can attest to your qualifications and interest as a volunteer EMS provider:

Name: _____

Address: _____

City/State: _____ Zip Code _____

Home Phone: (___) _____ Work Phone: (___) _____

Name: _____

Address: _____

City/State: _____ Zip Code _____

Home Phone: (___) _____ Work Phone: (___) _____

Name: _____

Address: _____

City/State: _____ Zip Code _____

Home Phone: (___) _____ Work Phone: (___) _____

Name: _____

Address: _____

City/State: _____ Zip Code _____

Home Phone: (___) _____ Work Phone: (___) _____

Name: _____

Address: _____

City/State: _____ Zip Code _____

Home Phone: (___) _____ Work Phone: (___) _____

By signing this application for membership, I hereby agree that the information provided is complete and accurate. I further understand that by providing this information I agree that the agency may verify the information received in evaluation of my application.

I further agree that I have read and reviewed the "Job Description - EMS Volunteer" and do comply with the qualifications and special skills as outlined. I have read and reviewed the "Volunteer Statement of Commitment" and realize that failure to comply with these requirements can result in my immediate dismissal from the agency.

_____   _____

Signature of Applicant   Date

_____   _____

Agency Supervisor   Date

TO BE COMPLETED BY AGENCY

PERSONNEL RECORD

MEMBER'S NAME: _____

NICKNAME: _____

ADDRESS: _____

_____
   City   State   Zip Code

HOME PHONE: (___) _____   WORK PHONE: (___) _____

SSN: _____   DATE OF BIRTH: _____

NAME OF SPOUSE (if applicable): _____

SPOUSE'S BIRTHDAY (if applicable): _____

CHILD'S NAME: _____   BIRTHDAY: _____

CHILD'S NAME: _____   BIRTHDAY: _____

CHILD'S NAME: _____   BIRTHDAY: _____

IN CASE OF EMERGENCY, NOTIFY:

_____   (RELATIONSHIP) _____

HOME PHONE _____   BUSINESS PHONE _____

PHYSICIAN'S NAME: _____

ADDRESS: _____

_____

PHONE: _____

MEDICAL ALLERGIES: _____

MEDICAL HISTORY: _____

_____

ANNUAL PERSONNEL UPDATE

NAME OF MEMBER: _____

PREPARED BY: _____

TITLE: _____

DATE: _____

PLEASE COMPLETE THE FOLLOWING INFORMATION:

OFFICES HELD:

COMMITTEE ASSIGNMENTS:

SPECIAL PROJECTS/ASSIGNMENTS:

PERFORMANCE EVALUATION:

SQUAD MEETINGS ATTENDED:

TRAINING MEETINGS ATTENDED:

OTHER PROGRAMS ATTENDED:
(Conventions, Seminars)

AWARDS RECEIVED:

DISCIPLINARY ACTION:

VOLUNTEER PERFORMANCE REVIEW

Name of Volunteer Member: _____

Agency Supervisor: _____

Date: _____

For Period of: _____

Please rate performance of the volunteer on each of the categories listed below:

       4 .... Outstanding

       3 .... Above Average

       2 .... Average

       1 .... Below Average

       0 .... Unsatisfactory

QUANTITY OF WORK (Amount of acceptable work: promptness and completion)

RATING	REMARKS & JUSTIFICATION

QUALITY OF WORK (Understanding of the job, efficiency, accuracy, uses good judgement)

RATING	REMARKS & JUSTIFICATION

INITIATIVE (a. Capacity as self-starter, work independently, plan ahead, amount of supervision required)

RATING	REMARKS & JUSTIFICATION

INITIATIVE (b. Ability to carry projects to completion, uses discretion in interpreting facts and drawing conclusions)

RATING	REMARKS & JUSTIFICATION

ATTITUDE TOWARD JOB (Drive, dedication)

RATING	REMARKS & JUSTIFICATION

ATTITUDE TOWARD OTHERS (Cooperation with co-workers, ability to communicate and work with others)

RATING	REMARKS & JUSTIFICATION

ATTENDANCE (Punctuality, regularity)

RATING	REMARKS & JUSTIFICATION

FLEXIBILITY (a. Adaptability to change in schedule)

RATING	REMARKS & JUSTIFICATION

FLEXIBILITY (b. Reaction to pressure)

RATING	REMARKS & JUSTIFICATION

APPEARANCE (Projects a professional image)

RATING	REMARKS & JUSTIFICATION

DEDICATION TO AGENCY (Assists with agency objectives)

RATING	REMARKS & JUSTIFICATION

PERFORMANCE (a. Patient care/skill level)

RATING	REMARKS & JUSTIFICATION

PERFORMANCE (b. Appropriate training level)

RATING	REMARKS & JUSTIFICATION

PERFORMANCE (c. Required tasks)

RATING	REMARKS & JUSTIFICATION

OVERALL EVALUATION

RATING	REMARKS & JUSTIFICATION

VOLUNTEER MEMBER'S COMMENTS: _____

_____

_____

_____

_____

_____

Next performance review scheduled for: _____/_____/_____

_____   _____
Volunteer Signature   Date

_____   _____
Agency Supervisor's Signature   Date

SQUAD TRAINING ROSTER
BY DATE OF EXPIRATION OF CERTIFICATION

MEMBER'S NAME																			
EMT - BASIC																			
SHOCK TRAUMA																			
CARDIAC - EMT																			
EMT - PARAMEDIC																			
EMT - EPHINEPHRINE																			
EMT - DEFIBRILLATION																			
CPR - BASIC LIFE SUPPORT																			
VEHICLE EXTRICATION																			
DEFENSIVE DRIVING																			
EVOC																			
BASIC & LIGHT RESCUE																			
HEAVY DUTY RESCUE																			
BASIC RESCUE TECHNICIAN																			
HAZARDOUS MATERIALS LEVEL 1																			
SEARCH & RESCUE																			
OTHER																			
OTHER																			

(Note: Duplicate as many copies of this page as needed)

INDIVIDUAL TRAINING RECORD

MEMBER'S NAME: _____

SOCIAL SECURITY NUMBER: _____

Please complete the following information for each training program completed:

COURSE NAME: _____

    DATE CERTIFIED: _____   INSTRUCTOR: _____   LOCATION: _____

    RECERTIFIED: _____   _____   _____

    RECERTIFIED: _____   _____   _____

    RECERTIFIED: _____   _____   _____

    RECERTIFIED: _____   _____   _____

COURSE NAME: _____

    DATE CERTIFIED: _____   INSTRUCTOR: _____   LOCATION: _____

    RECERTIFIED: _____   _____   _____

    RECERTIFIED: _____   _____   _____

    RECERTIFIED: _____   _____   _____

    RECERTIFIED: _____   _____   _____

(Note: Duplicate as many copies of this page as needed and number consecutively.)

ORGANIZING THE MEMBERSHIP

Check List

[ ]   Job Descriptions

[ ]   Membership Application

[ ]   New Member Orientation Program
       [ ]   Information Packet

[ ]   Personnel files
       [ ]   Complete
       [ ]   Current
       [ ]   Secure

[ ]   Membership Master Roster
       [ ]   Current
       [ ]   Available to all members

[ ]   Recruitment Program
       [ ]   Plan
       [ ]   Tools, brochures, business cards

[ ]   Retention Program
       [ ]   Incentives
       [ ]   Exit Interviews

[ ]   Regular Business Meetings
       [ ]   Current minutes
       [ ]   Working agendas

[ ]   Mail/information distribution policy
       [ ]   Mailboxes
       [ ]   Literature racks
       [ ]   Package receiving area
       [ ]   Bulletin boards
       [ ]   Internal newsletters

EFFECTIVE LEADERSHIP

Volunteer rescue squads are in the people business. Highly motivated, dedicated volunteers frequently resist and resent managers who seek to control all aspects of the squad and its work. What these members seek from their elected officers is leadership--not control. The purpose of this chapter is to review some techniques that address leader effectiveness.

MANAGEMENT STYLE

Management style is important because it determines how effective squad leadership will be. Consultants Robert R. Blake and Jan S. Moutan have developed a good model to help you think about management styles. They suggest that the leader has two major areas of concern: tasks to be accomplished and people to accomplish those tasks. Each leader balances people concerns and task concerns--but the balance may not be equal. In fact, most people will have one of five styles.

❶   Missionary (country club management). Such leaders are highly concerned with people. They are most interested in making sure that all members are happy and that the rescue squad is a comfortable, friendly organization. Such a leader is more interested in keeping everyone happy than providing the best patient care and rescue efforts.

❷   Deserter (impoverished management). These leaders have little interest in squad members or patient care. They do just enough work to keep the squad from completely dissolving.

❸   Autocrat (authority-obedience management). Such leaders care a great deal about the work of the squad, but little about its members. They believe that if everything is tightly organized and controlled, individual members will not "mess things up."

❹   Compromise (organization-people management). Such leaders are about equally concerned for people and the work they do. They seek a give-and-take between people demands and task demands.

❺   Executive (team management). These leaders are highly concerned about both people and task. They believe that committed members with a common concern about the work they do will create trust and respect. Such a management style is generally considered to be the most effective in providing patient care while meeting personal needs of the squad membership.

TEAM BUILDING

All squads accomplish their work through teams of different kinds; to function effectively, they must make sure that their work teams are productive. A work team of competent and cooperating people with the same general goals and resources to draw upon is the principal resource of an organization. Thus, it is vital that squads strive to improve the effectiveness of teams.

A team is a group "that produces the desired results despite problems" and "in which all members share responsibility for the group's success or failure." Team building is actually a form of management. The goal of team building is to create a climate that enables group members to achieve their individual goals while simultaneously accomplishing the goals of the team and the squad. Team building focuses on two substantive areas:

❶   <u>Task Accomplishment.</u> This area includes defining team objectives, analyzing work performance, determining skills needed to achieve the objectives, and specifying resources.

❷   <u>Team Processes.</u> This area focuses on how the team works, i.e., how meetings are run, how information is processed, how conflict is resolved, and how group members interact with one another.

A. Creating a Climate For Team Building

1.   Team building, with its benefit of increased squad commitment on the part of individual members, results in many positive benefits. For example, a team approach will:

     a.   Instill a desire in team members to produce their best efforts.

     b.   Tap the latent abilities of the individual as well as the group.

     c.   Fortify the social needs of the individual as he or she accomplishes squad objectives.

     d.   Help groups set high, yet realistic goals.

     e.   Enhance the communication and understanding of group decisions. Responsibility for decisions <u>and</u> implementation belongs to every member of the group, and self-centered solutions are eliminated. Groups make surprisingly good decisions which tend to have a high degree of ownership, support, and acceptance among the members.

2.   Several steps should be considered by leaders in the process of creating a climate for team building. Chief among them are the following:

     a.   Making sure all group members participate in setting meaningful team goals.

     b.   Making sure each individual can see how he or she personally contributes to the team and its goals. To insure that this occurs, leaders must provide opportunities for frequent clarification of individual member roles and responsibilities in carrying out various team efforts.

     c.   Making sure team members understand that they need to work together to accomplish their team goals.

     d.   Providing feedback to the team on a regular basis.

     e.   Making sure squad team successes and rewards (as well as setbacks) are shared by the team and not by individuals.

B.   Effective Team Building Stages

Most teams go through the following stages before they become fully effective:

1.   <u>Testing</u>. This is the stage when team members begin to find their places or roles in the group. Trust and distrust are evident during this time, and power-plays may occur.

2.   <u>Infighting</u>. During this stage, team members seek allies and establish ground rules for team work.

3.   <u>Organization</u>. Work actually begins and cooperation and effort increase during this stage.

4.   <u>Maturity</u>. All members acknowledge the work of the team, as opposed to individual effort, and share responsibility for work results.

A 1989 study by Perkins and Wright indicates that volunteer rescue squads in Virginia may spend more time "team fighting" than team building. This finding is particularly unfortunate since rescue work requires a team approach. A leader's attitude is basic to the success of team building in a group setting. A primary goal of a leader should be to build an effective squad team. In order to accomplish this goal, the leader must communicate its importance to squad members and solicit their support to achieve it. This kind of climate is needed for team building to prosper.

The ability of a squad leader to recognize and satisfy member needs is a tremendous talent. In many instances, the leaders we hold in high regard have been very successful in matching member needs with squad needs. A competent and compassionate leader will take time to discuss with the member his or her wants, needs, and desires. Once this information is known, a leader committed to getting the squad's goals accomplished will work to create a climate (team building) that harmonizes member needs (through appropriate job assignments) with those of the squad.

PROBLEM SOLVING

The first step in problem solving is to recognize that a problem exists, but this is not always as simple as it seems. Many squad members expect squad leaders to know when problems exist (the read-my-mind approach). Other members keep quiet about small concerns until they grow into big concerns and then bring them to the attention of the squad leader. These big problems take a lot of time to resolve. If they had been dealt with when they were small problems, they probably could have been avoided. The best way to detect problems is to be a good listener, and listening skills must be developed. Here are some useful tips:

☛   Take time to listen to others and to yourself.

☛   Be sure to hear both positive and negative information. We generally tend to hear the positive and tune out the negative (selective listening).

☛   Pay attention even when the discussion is about something in which you have no interest. It may be boring, but people are trying to communicate with you and you need to help by listening.

☛   Avoid serial communications (the verbal passing of a story from one person to another). Information frequently gets distorted this way. Go straight to the source for information.

☛   Be aware that the meaning of words is important. Many words used in EMS have local definitions that vary from one area to another. The word <u>squad</u> may refer to the entire

organization, or it may mean an ambulance or it may mean a rescue truck. In many parts of the country, a volunteer EMT is one who is on standby for the career EMT. When the volunteer EMT is called to work, he or she is paid for the time worked.

The general rule is to avoid words with suggested or implied meanings, if possible, and to explain technical terms clearly so they are easily understood.

When you have determined that a problem exists, the next step is to decide what kind of problem it is. One model suggests that problems tend to fall into four groups:

❶   Personal Problems. "I don't want to work on that team anymore."

❷   Agency Problems. "We don't have enough members to cover day-time calls."

❸   Interagency Problems. "ABC Rescue Squad is fundraising in our service area."

❹   Systematic Problems. "We can't convince an EMT instructor to teach a course at our building."

One useful aspect of this set of categories is that it helps prevent escalation of the problem. It is important that each problem be handled at an appropriate level. You do not want the entire squad to vote on why Jim and Joe can't get along, and you don't want to ask the state to create laws if other squads don't share the problems. Take time to consider each problem and its most likely type. This will help you resolve it.

Personal management style determines how one approaches problem solving. Below are examples of how leaders that use different types of management styles typically approach a problem.

❶   Missionary. Tries to smooth things over and avoid confrontation. Frequently ask in terms of "personal favors."

❷   Deserter. Hopes that the problem will go away.

❸   Autocrat. Writes a new policy.

❹   Compromise. Talks to everyone and tries to work out an agreement.

❺   Executive. Acts like the compromiser except generally sets limits not open to compromise. (Remember: This style is generally considered the most effective.)

Documentation is also an important part of problem solving. Most experts suggest that you use both a complaint log and a standard complaint form. The log and form can be generic enough to be used for all forms of complaint, whether it is from a member, a patient or a neighboring rescue squad. The complaint log is useful for evaluating the volume and types of complaints received and for checking to make sure that each complaint receives attention. The complaint log should include items:

❶   Incident number
❷   Date of complaint
❸   Person making complaint
❹   Information (including call-back number)
❺   Date of assignment to investigator
❻   Signature of assigned investigator

The complaint form documents information regarding each specific incident and any action taken. It is more detailed than the log and should include:

- Incident number
- Date of incident
- Time of incident
- Location of incident
- Complaint/allegation
- Date of complaint
- Person making complaint
- Assigned investigator
- Facts determined

- Cause determined
- How resolved
- Disciplinary action necessary
- Policy revision necessary
- Training need evident
- Other agency referral
- In-house staff notified
- Date matter closed
- Signature of assigned investigator

Ultimately, the best technique for problem solving is problem prevention, most often accomplished through good management and effective leadership.

MANAGING CHANGE

Some people love change. They rush out to buy the latest book, sign-up for the newest course, or insist that the squad buy a new gadget they just read about. Some people hate change. They remember a simpler time; for example, when the number of training programs could be counted on one hand and the textbook was current for more than a year. The rescue squad will have both types of people and the leader will be one of those types.

One point to keep in mind is that rescue squad work will change. There is no way that any member, leader or rescue squad can stop this fundamental fact. The major creators of change in EMS are:

❶ Technology
❷ The practice of medicine
❸ Public demand
❹ Squad membership, goals and needs

Change does have advantages. We can use change to become more efficient in our jobs, provide better patient care, create greater satisfaction for our members, and reduce costs. Given all these advantages, why do so many people resist even minor change? Change upsets the status quo and makes some people uncomfortable. Even minor changes may trigger fears related to a member's status, recognition and satisfaction. Furthermore, change may be perceived as a criticism that what one has been doing isn't good enough anymore.

The successful leader creates an environment that uses change to make the squad more successful in its work and more enjoyable for the members. The key to the integration of change into the squad is understanding and ownership by squad members. The squad leader needs to use team building, good listening skills and a high degree of concern for both the task and the people involved in order to bring about change that is useful to the squad and the community.

CONFLICT, CONTROVERSY AND POLITICS

Sometimes it seems that nothing is more typical of a volunteer rescue squad than conflict. Some members think that conflict is a terrible thing while others believe it is the spice of life. All human relationships carry potential for conflict. Some squad members, however, create relationships that thrive on or lead to conflict. Other squad members sometimes find themselves drawn into conflicting situations

where they serve "fixer" or "rescuer" roles or feed the conflict. Still another group may be classified as "avoiders" of conflict. These members will not allow themselves to be drawn into the situation even though their input would be useful. Basic sources of conflict include:

1. Aggressive or conflict prone personalities (EMS is full of these types of people. Aggressive, self-assured, controlling personalities are attracted to the work and do it well.)

2. Ambiguity

3. Conflicting priorities

4. Difference in perception (Reality is a personal thing.)

5. Oppressive management

6. Insufficient resources

Even the best managed rescue squad will experience conflict, but the well-managed rescue squad will use that conflict to reach new solutions which are often creative and exciting. Clarifying squad policy, improving communications, raising more funds, and involving members in goal-setting are preventive conflict measures.

Perhaps the most difficult situation to arise in a rescue squad is the development of cliques. Cliques often occur in response to controversy which has grown past what may have been a relatively simple issue into an issue in and of itself. Some cliques become very powerful and strive to make their opinions take precedence over those of other squad members. Such cliques often work politically to persuade other squad members to share their opinions. When this happens, it becomes necessary for the squad leader to deal with the situation in a political manner.

Politics should be viewed as the art of compromise. The successful politician, in this case the squad leader, will seek to meet individual wants or desires while doing what is best for the group. There is often little difference between an effective leader and a successful politician. Both listen well, have a high concern for the tasks of the squad and the squad members, and share power by involving members and developing ownership. Good leadership practices help keep conflict, controversy and politics at healthy levels in the organization.

NETWORKING

A network is a peer support system--an ongoing, sharing connection between people or organizations for exchange of information, ideas, expertise, personal support, materials and facilities, or some combination of these (Ivan Scheier). Virginia's regional EMS council directors have a network. The councils have little specific relationship to each other, but the directors find that the relevant, high-quality help provided through networking is valuable to each.

Rescue squad leaders also need to establish networks. Typically, a rescue squad network consists of other rescue squad leaders, regional and state EMS staff members, local physicians, local voluntary action center staff member(s) or Cooperative Extension agents, people at the local community college and local government officials. In general, you should think of the squad's network as all those people its leaders would call upon for help or information.

Networks are built in various ways, but probably the most helpful is to attend meetings or conferences where you can meet people that share your interests. Once you have established contacts, you will have an information and assistance bank that can be considered a part of the squad's network.

Hints for successful networking:

❶ Join a selected number of groups (e.g., Chamber of Commerce, VAVRS, National Association of EMTs).
❷ Attend functions of those groups.
❸ Meet people, ask questions, and be social at those functions.
❹ Have business cards printed and keep a supply with you.
❺ Collect other people's business cards and make notes on the back about projects/information they have of interest to you.
❻ Respond promptly if other people ask you for information. Networking works both ways.

TIME MANAGEMENT

There are no secrets to time management. By spending time wisely, one can actually expand the amount of time available. The three most important rules of time management are:

1. Make lists.

2. Prioritize your time.
   a. Quit doing things that don't have to be done.
   b. Do the most important things first.

3. Delegate tasks.
   a. As much as possible.
   b. To as many people as possible.

Remember, you can't do everything yourself. Don't try. ("Only Robinson Crusoe could get everything done by Friday.") It will only make you and the squad unhappy.

MANAGEMENT LIBRARY

Every squad should have a management library, in addition to its textbook and video libraries, which includes the following basic items:

1. This manual
2. Rules and Regulations Governing Ambulance Service in Virginia
3. The PRISM Manual
4. Manuals for completing the Virginia Patient Care Reporting System (two volumes--one red and one green)
5. Virginia Communications Directory
6. Robert's Rules of Order, Newly Revised, if it is used as a parliamentary source
7. State Ambulance Contract Manual
8. Virginia laws related to EMS
9. Virginia Division of EMS Volunteer Retirement Manual

In addition, there are excellent publications available from the Center for Volunteer Development, Virginia Tech, Blacksburg, VA 24061-0150, on such topics as effective meetings and boards, grantsmanship and volunteer recruitment.

The author would like to acknowledge that the outline, ideas, and quotations from this section were derived from the National Fire Academy's resident program, "Management of Emergency Medical Services." Grateful appreciation is expressed to David Lehnhof and Richard Steinberg for their work, effort and documentation. I highly recommend the course to all EMS leaders. (JMW)

LEADER EFFECTIVENESS

Check List

[ ]   What is my personal management style? Am I a people-oriented person or a task-oriented person? Do I balance my people concerns and task concerns effectively?

[ ]   Do I listen well? Can I improve my listening skills?

[ ]   Do I evaluate problems as to their basic sources and address them at the appropriate level?

[ ]   Do I cultivate and participate in networks?

[ ]   Do I have business cards to share?

[ ]   Do I prioritize tasks?

[ ]   Do I delegate wisely and frequently?

[ ]   Do we have a standard complaint form?

[ ]   Do we have a complaint log?

[ ]   Do we have a management library?

[ ]   Do we use words with multiple meanings? Is our squad language (slang) ambiguous?

[ ]   Has the squad reached team maturity? If not, what is our current stage of maturity?

[ ]   Do we use change to our advantage?

[ ]   Are we managing conflict by:
    ( )   reducing confusion?

    ( )   having clear priorities?

    ( )   understanding different perceptions?

    ( )   creating squad ownership in decisions?

    ( )   having adequate resources to get the job done?

PLANNING AND EVALUATION

Have you ever been part of a crisis decision? For example, trying to decide where you will get money for an unexpected needed purchase? If so, you are not alone. Such decisions must be made in every volunteer rescue squad. You cannot possibly eliminate the necessity for crisis decisions; unexpected events will occur despite your best efforts. (Who could have foreseen, for example, that some ambulances are prone to catch fire, and that as a result, only diesel powered vehicles would be available?) There is a way, however, to reduce the number of crisis or quick decisions to be made, and that is through planning.

Planning is the process which helps the squad determine its future path. It considers the mission, goals, and current status of the organization, and emerging trends that might affect it. A knowledge of the latter is necessary in order to make reasonable predictions about the future, especially important in long-range planning. For example, if the squad is located in a heavy population growth area, you might reasonably predict a certain percentage of population increase. If the prediction is true, it might translate to a need for x number of additional volunteers, vehicles, dollars, etc. It might even mean the area will need an additional squad or squads to serve the increased population. Plan as if the predictions will come true. If they do not come true, plans can be revised accordingly. After all, planning is an ongoing process of monitoring, evaluating, and redefining goals, objectives, and strategies for reaching them.

Planning is not just a paper exercise although all effective plans are written. The process should be taken seriously, but the resulting plans should always be flexible enough that they can be changed. Properly done, the planning process will strengthen the squad and intensify its sense of purpose.

STRATEGIC (LONG-RANGE) PLANNING

Many of the problems facing squad volunteers today could have been avoided or at least lessened through strategic planning. It is a means of getting from *here* to *there.* At its simplest, strategic planning could be defined as: *"Attempting consciously to create a more desirable future."*
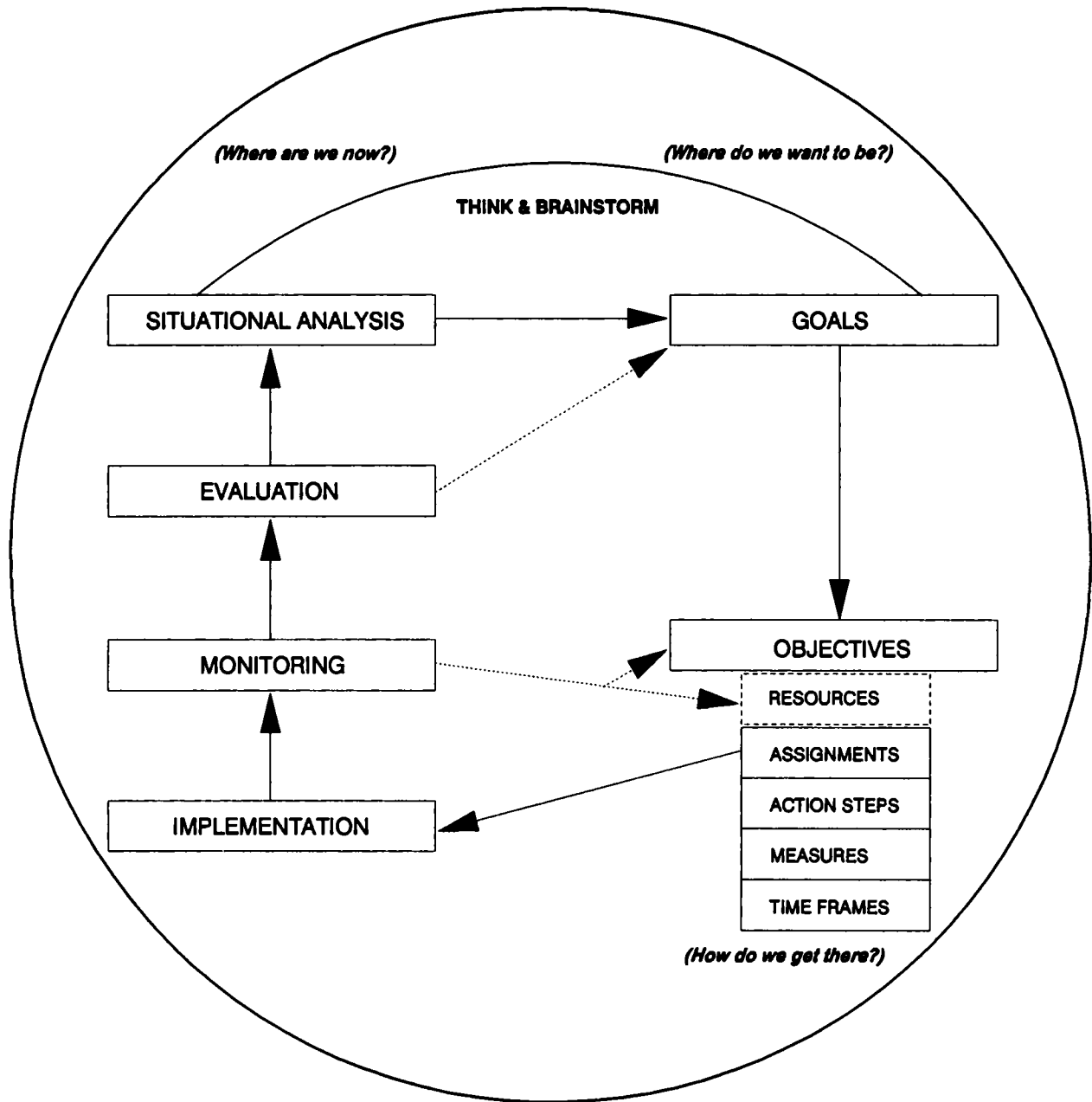
The rationale underlying strategic planning is relatively simple: by analyzing where you are now, and where you wish to be in the future, you are more likely to determine what you need to do to succeed, and to focus attention and resources on that effort.

The following are elements common to the strategic planning approach:

1. Conducting an examination of likely future environments
2. Assessing organization and environmental needs
3. Developing a common sense of organizational mission or purpose
4. Creating programmatic goals
5. Formulating specific program objectives
6. Prioritizing goals and objectives
7. Identifying potential resources
8. Constructing a definitive plan of action and implementation
9. Evaluating progress

These elements are usually combined into a plan which provides direction for three to ten years of organizational activity. A strategic planning model is shown on p. 81.

STRATEGIC PLANNING MODEL

(Where are we now?)   *(Where do we want to be?)*

THINK & BRAINSTORM

SITUATIONAL ANALYSIS → GOALS

EVALUATION

MONITORING

OBJECTIVES

RESOURCES
ASSIGNMENTS
ACTION STEPS
MEASURES
TIME FRAMES

IMPLEMENTATION

(How do we get there?)

UNIVERSITY OF FLORIDA
Center for Community Education

COLLEGE OF EDUCATION
Gainsville, Florida 32611

(TP)

81

A. **Collecting Data:** Before the squad can complete a mission statement or develop goals and objectives, it must have an accurate picture of what it is currently doing. To get this picture, you need to gather information about the service area, perceptions of the public and squad members, available resources, squad needs, etc. Collecting data is not a difficult task, but it does require some effort. Much of what you will need has already been collected by someone else.

Included with this chapter are two forms designed to help you collect relevant data (volunteer perceptions survey and service-area survey). Use these forms to gain a better understanding of how members and business leaders in the community feel about the squad. Make use of available resources to avoid duplicating data-collection efforts. Listed below are several agencies which may be able to furnish data:

- County/City Planning Department
- Local Planning District Commission
- Local library
- Local hospital
- Regional EMS Council

B. **Developing A Mission or Purpose:** The purpose of the squad should be based on local, state and federal standards established for the EMS field. The necessity of meeting all established standards is controversial in some squads. Nonetheless, a volunteer rescue squad should never try to reduce standards; instead, it should strive to find ways to meet them. The bottom line is that patients deserve to have the highest quality care available.

The mission statement or purpose is the primary focus for strategic plans. It's a brief written statement which explains why the squad exists, its most important services, its main strengths, and what the organization believes in. When developing a mission statement, answer the following questions (The answer to many of them may be found in the squad's Articles of Incorporation.):
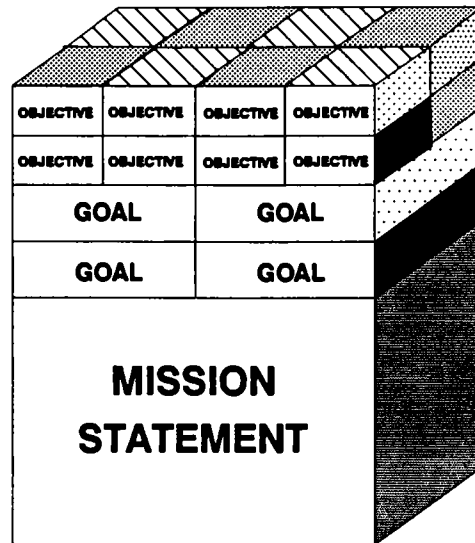
1. Why does the volunteer rescue squad exist?
2. What business are we in?
3. What is our most important service or product?
4. Who are our clients?
5. What is our service area?
6. With whom do we need to work to serve our clientele?
7. What is the nature of our relationship with these groups?
8. What are our unique strengths?
9. What beliefs are important to us regarding our business?
10. What would be lost if we ceased to exist now?

Sample Mission Statement

The mission of the _____ Rescue Squad is to serve the community of _____ by minimizing the impact of natural and man-made emergency conditions through prevention, public education, and emergency medical service measures. The emergency medical service shall be utilized to alleviate unpreventable distress and to bring about an effective and timely return to the public's perception of normal conditions, within the scope of resources provided.

(Adopted from the mission statement of the Sierra Vista, Arizona, Fire Department.)

The schematic below can help you visualize how the mission statement, goals, and objectives relate to each other.

C. **Developing Goals and Objectives:** Goals and objectives are the basis of the squad's plan. When you get into the planning process, however, it's easy to set goals which are too lofty or objectives impossible to attain. Remember: There are some things for which you can't plan, and some things which you should not even try to do.

Goals are broad written statements of what you wish to accomplish. An example might be to *provide advanced life support.* Goals may not be achieved because they often establish an on-going activity. If they were achieved, there would be no reason for the squad to continue to exist.

Objectives are written statements which describe what you must do to achieve a goal. When you establish objectives, try to follow the SMART principle:

1. $\underline{S}$PECIFIC   4. $\underline{R}$ELEVANT
2. $\underline{M}$EASURABLE   5. $\underline{T}$RACKABLE
3. $\underline{A}$TTAINABLE

Objectives are much more specific than goals and should be written in a way that you will know when they have been achieved. Example: *To train 5 members as paramedics by a specific date and at a cost of X dollars.*

Objectives which don't specify what you are trying to do will likely never be reached. For example, *to train ALS providers* does not give a specific representation of what you want to do. Each objective must be measurable. How do you know how many trained ALS members you will need or when they will be needed? If the objective is impossible to reach, frustration and failure will surely follow.

Is the objective relevant to the goal? For example, an objective such as *to purchase special uniforms* may not be relevant to achieving ALS. Finally, objectives must be trackable. Example: *Five new ALS providers will accumulate 50 continuing education hours and become skill-proficient as determined by the operational medical director.* Tracking objectives will help validate efforts to reach the goals.

D. <u>Prioritizing (Ranking) Goals and Objectives</u>: Goals and objectives may be ranked in these ways:

➀ Those essential to organizational survival.
➁ Those central to the organization's mission.
➂ Those which make possible future goals.
➃ Those which offer the greatest long-term benefit to the squad.

At this point, however, you need to rank the goals in a more narrow fashion. Decide which ones should be given immediate priority. Determine which you need to work on during the next year, based on their crucial importance.

The next step is to identify resources needed to reach the goals and objectives. Remember that resources mean <u>more</u> than money, but most often must <u>include</u> money. Ideas, personal contacts, useful information, and people willing to help are resources which can be equally as useful as money resources.

E. <u>Evaluation</u>: Evaluation is a process that helps you to know how well you are doing. It is a method of monitoring the squad's performance against its goals and objectives (much easier if goals and objectives have been clearly defined). Evaluation keeps both managers and members focused on the squad's plan.

Methods for evaluation should be written into the strategic plan, and all squad officers, directors and members should be involved. Those chiefly responsible for direction of the squad should be prepared to make changes as needed, based on suggestions and recommendations of members.

Since evaluation is a continuous process, you might form a committee and make it responsible for evaluating the squad's goals and objectives. (If this method is chosen, the committee should make it a point to gather input from other squad members, officers, etc., as appropriate.) An evaluation could occur every few months, but not less than once each year. An evaluation conducted near the end of the year will enable the incoming officers and directors to make any needed changes during the coming year. The committee should list each goal, all objectives relative to reaching the stated goal, and the target date for completing the objective. Once this has been done, the committee should consider the following in making a decision about each goal:

☞ Review performance standards and all other available data for each objective. Have the standards been met? If not, which were not met? Has the service relating to this goal been improved? If not, why not?

☞ Has acceptable progress been made toward the deadline? If not, why not? What factors caused a delay?

☞ Was the objective met or did it produce the desired results? If not, why not? What factors prevented the desired result?

Make a list of the committee's findings for each objective. This will give you a clear picture of what has occurred since the last evaluation or the objective was established. Decide what can be done to correct any existing deficiencies. When the evaluation is complete, the committee should prepare a report and make a review copy available to each officer and director, and to all members. The report should include all findings and recommendations and serve as the basis for necessary changes.

VOLUNTEER PERCEPTIONS

I. **Organization and Policies Perceptions**

1. To what extent are you made to feel an important part of the squad?

   _____Not at all   _____Some
   _____Little   _____Much

2. Do you feel that managers demonstrate favoritism in our squad?

   _____No favoritism
   _____Little favoritism
   _____Much favoritism

3. How much advancement do you feel is available within our squad?

   _____None
   _____Some
   _____Much

4. How do you feel about the appearance of our squad building, equipment and members?

   _____Embarrassed   _____Satisfied   _____Proud
   _____Somewhat dissatisfied _____Neutral

5. How would you rate the squad's policies and procedures?

   _____Never seen them   _____Fair   _____Excellent
   _____Poor   _____Good

6. When you joined the squad, how were the policies, procedures and requirements explained to you?

   _____Not at all   _____Adequately
   _____Not adequately   _____Exceptionally well

7. Do you feel that you are included in the planning process of the squad?

   _____Not at all   _____Frequently
   _____Sometimes   _____Always

II. **Job Perception**

8. How do you feel when you tell people you are a volunteer EMS provider?

   _____So-so   _____Good   _____Proud

9. To what extent do you understand what is expected of you in performing your job?

   _____No understanding   _____Fair understanding
   _____Poor understanding   _____Clear understanding

10. How do you feel that the training provided prepares you to do your job?

_____Do not feel prepared   _____Adequately prepared
_____Somewhat prepared   _____Excellent preparation

11. How do you feel about the number of job expectations placed on you?

_____Too many expectations   _____Too few expectations
_____Adequate expectations

12. If you were to start over, would you join our rescue squad?

_____Yes
_____No
_____Don't know

III. Supervision

13. Do the managers (squad officers) set a good example in their own membership?

_____None of them do   _____Most of them do
_____Few of them do   _____All of them do

14. When managers correct you or criticize your work, do you feel it's done in the constructive manner?

_____Never   _____Usually
_____By some managers   _____Always

15. Do you feel that managers are given an opportunity to learn how to supervise others?

_____Yes
_____No
_____Not sure

16. Do you feel that you are given an opportunity to offer suggestions or ideas on how things could be done better?

_____Never   _____Sometimes   _____Always
_____Almost never   _____Frequently

Please list any suggestions you have on how we can improve our squad!

DATA COLLECTION

Service Area

1.   Description of Service Area (describe boundaries, borders, etc.)

2.   Size of Service Area: _____
       (# Acres/640 = square miles)

3.   Population Data

       Total Population: _____

Census Tract SRA	Population	Number of Calls	Number of Households	Mean Household Income	Mean Personnel Income
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Population Age:

Age	Population by Age	Number Calls/Age Group	Number Calls/ Thousand
<20	_____	_____	_____
20-29	_____	_____	_____
30-39	_____	_____	_____
40-49	_____	_____	_____
50-59	_____	_____	_____
60-64	_____	_____	_____
65+	_____	_____	_____

List the four major causes of death in the service area:

_____

_____

_____

_____

Call Types:

Priority 1 Calls _____   _____ Response Time
Priority 2 Calls _____   _____ Response Time
Non-Emergent Calls _____   _____ Response Time

(Calculate response time by adding the number of minutes from the time the call was received until an ambulance was on scene; divide by the total number of calls.)

Priority 1 = Immediate threat to life or limb if medical care not within one hour (i.e., cardiac arrest, shock, etc.)

Priority 2 = Threat to life or limb if medical care not within several hours.

Priority 3 = No threat to life or limb if medical care delayed

Call Frequency Time of Day	Number calls/60 (min.) Number Calls Received	Call Frequency
0000 - 0059		
0100 - 0159		
0200 - 0259		
0300 - 0359		
0400 - 0459		
0500 - 0559		
0600 - 0659		
0700 - 0759		
0800 - 0859		
0900 - 0959		
1000 - 1059		
1100 - 1159		
1200 - 1259		
1300 - 1359		
1400 - 1459		
1500 - 1559		
1600 - 1659		
1700 - 1759		
1800 - 1859		
1900 - 1959		
2000 - 2059		
2100 - 2159		
2200 - 2259		
2300 - 2359		

PLANNING AND EVALUATION

Check List

[ ]   Do we have good data/information about public perceptions? When was the last time we did a survey?

[ ]   Do we have a clear, current mission statement?

[ ]   Does the membership hold a clear idea of the squad's mission? When was the last time we polled members on agency satisfaction?

[ ]   Do we have a written plan?

[ ]   Have we set written goals for the future?

[ ]   Have we set specific written objectives in order to meet those goals?

[ ]   Have we shared the plan, goals and objectives with the membership? Do they know that we are striving toward these results?

[ ]   Is our plan and its goals and objectives SMART (specific, measurable, attainable, relevant, trackable)?

[ ]   Do we have an evaluation committee?

[ ]   Are we evaluating our progress at least annually?

[ ]   Are we reviewing the total plan periodically?

PUBLIC RELATIONS

Every time the rescue squad answers a call--emergency or non-emergency--a public opinion is formed about how the squad operates. How the crew members look, act, and perform their duties contribute to this opinion and become a part of the squad's public image. A positive public image is important and can affect recruitment and retention of members, fundraising and the squad's relationship to the community. A positive public image is not bestowed upon the squad; it is something that all members must work to develop and maintain. This chapter will provide some basic ideas on promoting a positive image through public relations.

A good basic source of information to help you prepare a public information or public relations program is the Virginia Division of EMS Public Relations Information Source Manual (PRISM). A copy of this manual, developed by Mark D. Whiting, has been distributed to each EMS agency in the Commonwealth. Some of the ideas and suggestions contained in PRISM are presented in this chapter.

PREPARATION FOR A PUBLIC RELATIONS PROGRAM

Begin with a core group of squad members interested in public relations who will function as the PR Committee. This committee will be responsible for developing a public relations plan and for implementing all public relations programs.

The first step in developing the public relations plan is to determine the present public image of the squad. This step is important and should not be overlooked. The best way to do this is through a survey of the public's perceptions of the squad. The survey can be done by telephone, mail, or canvassing the neighborhood. A sample survey form is contained in Chapter 8 since knowledge of public perceptions is also an important element for planning.

The findings from the survey will be the foundation for the public relations program. If membership resources to conduct the survey are a problem, consider contacting a local community college, business marketing firm or other resource which may be able to help you.

Every agency should designate a public information officer (PIO). The PRISM manual contains valuable information on the PIO and how this person can maintain high visibility with the media.

Prepare squad membership for the public relations programs. Remind them of their value to the program and how their appearance, actions and personal pride will enhance the PR program. Keep in mind that the physical plant (building and grounds), vehicles and equipment are also an important part of the squad's public image. Keep the building, vehicles and other equipment in good repair and looking their best.

SOME PUBLIC RELATIONS ACTIVITY SUGGESTIONS

EMS personnel are some of the most creative and imaginative people in our society. Use this creativeness to expand on ideas for public education. Remember, the goal of a public relations program is to further the mission or purpose of the rescue squad. Challenging all other area rescue squads to donate $10 to the annual MD telethon is heart-warming, for example, but it does not help to further the squad's mission and goals. Try to get the TV stations to give the squad some time to promote its fundraising activity, e.g., an auction to raise funds to buy a much-needed new ambulance.

Let the public know who and what you are. Here are a few suggestions to help you with this:

❶ Prepare a simple fact sheet or package about the squad. Give history, number of volunteers, number of ambulances, number of calls, etc. Tell how to call for the squad and give hints on when people should or should not call. (Be careful on this one. You might want the squad's attorney to take a look at what you're saying before the information is distributed.)

Let the public know what to do when an ambulance is coming down the road with red lights flashing and sirens wailing and what to do while waiting for an ambulance to get to the emergency scene.

Mail the flyers, fact sheets or packets during the annual fund drive, or leave them at area stores, churches, community centers, etc..

❷ Schedule and promote an open house. A lot of preparation goes into such events, but the rewards are many. Among other activities, let the public look at the ambulances and climb around them. This can inform them of the squad's purpose, the skills necessary to be a squad member, and possible equipment needs. Let children listen to their heartbeat through a stethoscope or lie down on a stretcher. Consequently, if they ever need to be transported in an ambulance, they may not be as fearful.

Demonstrate CPR. It may get citizens interested in taking a CPR course.

Use coloring books and balloons with different safety messages to inform children and parents of simple safety measures.

Have a recruitment booth where individuals may ask questions about the squad and its work and sign up as potential volunteer recruits.

Sponsor a contest in the local schools and present awards to the winners at open house. This will help bring more people to the station.

❸ Form a speakers bureau to provide someone to speak about the squad to various groups. Parent Teacher Associations and local civic clubs, for example, present formal programs at their meetings and often look for informative presentations. Seek out such groups, write or call their program chairperson, and offer to speak to them about the squad and/or safety programs. Use this time to recruit new members.

❹ If you have bingo, consider making a short public announcement at intermission. Let participants know how the proceeds from bingo are helping the squad serve the community more effectively.

❺ Periodically sponsor CPR courses for the public. The courses are effective public education, and may interest some people in becoming a volunteer EMT.

Use imagination to develop programs, suitable to the squad's needs, that might promote better public relations in your community. But always remember that good public relations are carried out every day as squad members in uniform, looking neat and clean, proficiently perform their duties.

DEALING WITH NEGATIVE PUBLICITY

Every public education plan needs a segment on how to deal with negative publicity. Public attention on a highly-charged event can intensify a simple act into something very volatile. If there are existing negative attitudes about an EMS agency, public criticism can severely hurt its support base.

Suppose a squad ambulance breaks down on the way to a school bus accident where many children from the community are hurt. How will you deal with the angry parents and information concerning the incident? Here are a few things you should practice to prevent negative publicity or ways to prepare for it before it happens:

☛ Agree on a spokesperson for the squad. This person should be a recognized leader in the organization and understand how it works. The spokesperson should be briefed (preferably trained) in communications skills like public speaking and media interviews.

☛ Allow only one person to do the talking--the spokesperson. Be sure members know that in the event of negative publicity they must not volunteer information and that all questions should be directed through the spokesperson.

The spokesperson should be confined to giving information about EMS only. Answers and statements not directly related to the rescue squad should be addressed by some other organization.

☛ Have a package of information on the squad's operations, vehicles, number of volunteers and certifications, history, etc., ready to help inform the public.

☛ Make sure the reporting system is rigid and covers information needed to present facts accurately and precisely.

☛ Obtain the facts fast, and verify! Confirm reports and reject any rumors. Do not speculate. In a crisis situation, you need to be the best-informed source of facts.

☛ Be honest with the public and the media. Give facts without prejudice and opinion. If asked your opinion, make sure it is labeled as such. If the squad did something wrong, admit it. If you are required to report to certain agencies, do so promptly.

When you do not know the answer to something, admit it. Say, "I don't know the answer to that. Let me find out and get the information to you as quickly as possible." Such words can be very important when the squad is the focus of negative publicity. Don't be afraid to appear uninformed. Get and give the information needed accurately.

☛ Communicate with the public and media frequently. When you learn a new fact, let it be known. The more honest and forthright the dialogue, the better the squad's image.

☛ Make clear distinctions between groups and what they have a "right to know." The timing and way facts are disclosed can be crucial. Recognize that there are times when certain people or groups have a right to certain facts before the general public. Rarely should knowledge of facts be rigidly restricted to certain groups, however.

☛ If you have friends in certain groups or in the media, call on them for help. Friendly voices in a negative situation can be very helpful.

☛ Follow up the event in the days and weeks ahead with regular communication with the groups involved.

- Try to find out if any negative attitudes exist after the incident. Go to work to improve public relations concerning them.

- Make integrity the center of all public relations and education efforts. Address negative publicity with integrity, and the good public image you had prior to the event will remain intact.

And, above all, **TELL THE TRUTH!**

You will find excellent suggestions on how and when to work with the media in the (PRISM) publication. It contains sample public service announcements, press release forms, media fact forms, etc., as well as information on press briefings, being interviewed, how to write for radio/television, and on-scene media relations.

PUBLIC RELATIONS

Check List

[ ] Do we have a
    ( ) public relations plan?
    ( ) public relations committee?
    ( ) public information officer?

[ ] When was the last time we surveyed public perceptions of our service to the community?

[ ] Is our public relations plan and our public relations activity relevant to our agency's mission and goals?

[ ] Do we have a positive public image?

[ ] Do we have informational packages prepared for emergency use with the media?

[ ] Have we established working relationships with media representatives?

[ ] Do we follow-up major media coverage of EMS incidents?

[ ] Are we helpful to the media?

[ ] Are we always honest with the media?

PARTICIPATION IN THE EMS SYSTEM AND SOURCES OF HELP

The volunteer rescue squad is only one of many elements in the emergency medical system. To meet its goal effectively, all people and agencies involved must be aware of the special functions and contributions of each and make a commitment towards working together.

Who is involved in the emergency medical system? In terms of people: EMTs, shock-trauma technicians, cardiac technicians, paramedics, firefighters, law enforcement officers, physicians, nurses, hospital administrators, regional council staffs, state office staffs, city managers and county administrators, newspaper and other media reporters, and dispatchers. In terms of organizations and agencies:

- commercial and third-service EMS agencies
- industrial and military emergency services
- law enforcement agencies
- communications centers
- regional EMS councils
- television and radio stations
- universities and community colleges
- helicopter and air ambulance services

- rescue squads
- fire departments
- hospitals
- trauma centers
- local governments
- newspapers
- state offices

Professional associations include:

- Virginia Association of Volunteer Rescue Squads
- Emergency Nurses Association
- National Association of EMTs
- American College of Emergency Physicians

This fairly long list should remind us that EMS is a cooperative effort designed to provide the best possible assistance for citizens in need. For this reason, we are all obligated to have an accurate and thorough understanding of the role of the individuals and groups involved.

Most rescue squad members are familiar with the importance of their agency in providing emergency care. In general, they are aware of the role played by technicians certified at the various levels and the squad's working relationship with local fire departments, law enforcement agencies, dispatch centers, city or county government and the media. This final chapter is a brief summary about state agencies, professional associations and regional EMS councils. It serves as a reminder that all these organizations are available to assist squads with management issues.

STATE AGENCIES

The state agency assigned primary responsibility for emergency medical services in the Commonwealth is the Department of Health, Division of Emergency Medical Services. Among its products, services and responsibilities are:

❶ Administering the Rules and Regulations Governing Ambulance Service, which includes:
** Agency licensure
** Vehicle Inspection and licensure
** Technician certification

❷ Establishing standards and guidelines for training programs

③ Maintaining a statewide plan and sub-plans for areas such as Medevac service, communications systems and disaster management

④ Administering the Rescue Squad Assistance Fund and the state ambulance contract program

⑤ Administering the PreHospital Patient Care Reporting System and the Trauma Registry

⑥ Assisting in the designation of Trauma Centers

The Division staff is assisted with these efforts by an advisory board appointed by the governor. The advisory board is comprised of 37 individuals who represent organizations and specialties with a commitment to EMS.

Other state agencies that can provide assistance to rescue squads include:

☞ Virginia Department of Fire Programs
☞ Virginia Department of Volunteerism
☞ Virginia Cooperative Extension
☞ Center for Volunteer Development, Virginia Tech
☞ The Virginia State Police Aviation Unit
☞ The Virginia Department of Emergency Services

REGIONAL COUNCILS

The Commonwealth of Virginia is divided into eight EMS regions, each served by an EMS council which is a private nonprofit corporation. (Note: Regional EMS councils are not field offices for the State Division of EMS.) The regional councils are run by a board of directors. These directors may be members of local government, rescue squads, fire departments, hospitals, or other groups with an interest in EMS. In order to accomplish what the board of each council wishes, each board hires professional staff to implement its plans and projects.

Activities of regional councils frequently include:

♦ sponsorship of regional teams such as the Critical Incident Stress Debriefing Teams;
♦ development and promulgation of regional patient treatment protocols and coordination of region-wide drug box exchange systems;
♦ disaster, communications and other region-wide planning activities;
♦ sponsorship of training programs in basic life support, advanced life support or both areas;
♦ publication of newsletters and other public education materials;
♦ development and distribution of manuals, directories, and documents related to specific EMS topics;
♦ ownership of communications systems; and
♦ technical assistance to local agencies.

One source of funding for regional councils is an annual allocation from the Two for Life program. These funds establish a contractual relationship between the Virginia Division of EMS and each regional council. As a stipulation for receiving these funds, each council must accomplish a specific set of contractual items. To accomplish work beyond what is stipulated, each council must raise local funds for that purpose. In addition, each council must be able to provide a 25% match to state funds.

Because regional councils are directed by boards made up of local representatives, each local rescue squad is responsible for remaining in touch with the regional council and for providing input regarding direction for future council activities.

PROFESSIONAL ORGANIZATIONS

Professional organizations are generally nonprofit organizations which individuals or groups join for a variety of reasons. Joining almost always requires annual payment of dues. Professional organizations active in EMS in Virginia include:

☞ Virginia Association of Volunteer Rescue Squads
☞ Virginia Chapter of the American College of Emergency Physicians
☞ Virginia Chapter of the American College of Surgeons
☞ Emergency Nurses Association

Many of these organizations are actually national associations with associated state chapters or members. The National Association of Emergency Medical Technicians (NAEMT) and its Societies for Paramedics, Instructors and Administrators would be the prehospital equivalent of the physician and nursing national groups. Unfortunately, NAEMT does not have a Virginia chapter, although many technicians in the state are members of the National Association and participate in its activities.

SCIENTIFIC AND EDUCATIONAL ASSOCIATIONS

Many of the scientific and educational associations are well known to the EMS community. They include:

☞ American Heart Association
☞ American Trauma Society
☞ American Red Cross

In general, these are national organizations with state and often local chapters. Of particular interest to rescue squad members is the general use of CPR curriculums from either the American Red Cross or the American Heart Association; the use of the Advanced Cardiac Life Support and the Pediatric Life Support courses of the American Heart Association; the use of the PreHospital Trauma Life Support Course of the American College of Surgeons; and the use of the Basic Trauma Life Support Course of the American College of Emergency Physicians.

THE FEDERAL GOVERNMENT

During the 1970s, the federal government was active in EMS issues. Today, the Department of Transportation acts primarily as a group to set standards or guidelines. States are not required to adopt federal standards or guidelines, but Virginia frequently does. Of particular interest is that Virginia utilizes the National Standard Curriculum for Emergency Medical Technicians and the National Standard Curriculum for Paramedics. Federal standards are also available for ambulance design (called the KKK specifications), and many EMS agencies use these standards as guidelines when purchasing new vehicles.

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Administrative Management Society
2360 Maryland Road
Willow Grove, Pennsylvania 19090

American Academy of Orthopedic Surgeons
444 North Michigan Avenue
Chicago, Illinois 60601
(312) 822-0970

Note: Publishes standard EMT textbook.

American Academy of Physicians' Assistants
2431 Jefferson Davis Highway, Suite 700
Arlington, Virginia 22202

American Ambulance Association
141 21st Street, Suite 404
Sacramento, California 95814
(916) 448-5223

**American Association for Adult
& Continuing Education**
1201 16th Street, NW, Suite 301
Washington, DC 20036

American Association for Higher Education
One Dupont Circle, Suite 600
Washington, DC 20036

American College of Emergency Physicians
P. O. Box 61911
Dallas, Texas 75261
(214) 659-0911

Note: Sponsors EMS Information Center.

American College of Surgeons
Committee on Trauma
55 East Eire Street
Chicago, Illinois 60611
(312) 664-4050

American Health Care Association
1200 15th Street, NW
Washington, DC 20005

American Health Association
44 East 23rd Street
New York, New York 10010

Note: Co-sponsors CPR standards with the American National Red Cross.

American Hospital Association
840 North Lake Shore Drive
Chicago, Illinois 60611

American Management Association
135 West 50th Street, NW
New York, New York 10020
(212) 586-8100

Note: Widely respected source of general management information. Publishes a great number of management textbooks through their subsidiary, AMACOM (American Mgt. Assn. Communications Division). Also offers management seminars.

American Medical Association
Emergency Medical Services Section
535 North Dearborn Street
Chicago, Illinois 60610
(312) 751-6000

Note: Publishes Allied Health Education newsletter.

American Red Cross
17th and D Streets
Washington, DC 20006

Note: Co-sponsors CPR standards with the American Heart Association, offers a number of public education programs.

American Psychological Association
1200 17th Street, NW
Washington, DC 20036

American Society for Association Executives
1575 I Street, NW
Washington, DC 20005

Note: Publishes variety of nonprofit agency reference material. Also offers seminar programs.

American Society for Healthcare, Education & Training
840 North Lake Shore Drive
Chicago, Illinois 60601

American Society for Training and Development
600 Maryland Avenue, SW, Suite 305E
Washington,DC 20024

Note: Offers seminars for trainers.

American Trauma Society
875 N. Michigan Avenue
Chicago, Illinois 60611

Note: Offers Public Relations Guidebook, information on trauma reduction, technical assistance through state divisions and publishes "Traumagram."

Association for Educational Communications and Technology
1201 16th Street, NW
Washington, DC 20036

Association for Supervision and Curriculum Development
225 North Washington Street
Alexandria, Virginia 22314

Audio Visual Management Association
P. O. Box 821
Royal Oak, Michigan 48068

Center for the Study of Mental Health Emergencies
National Institute of Mental Health
5600 Fishers Lane, Room 6C12
Rockville, Maryland 20857.

Note: Material on stress management and psychological effects of disasters.

Department of Transportation
Emergency Medical Services Branch
Enforcement & Emergency Services Division
National Highway Traffic Safety Administration
400 Seventh Street, SW
Washington, DC 20590
(202) 472-5440

Note: Ambulance standards, courses for EMT, EMT refresher, EMT paramedic, trademark on "Star of Life," administers Standard 11 of the Highway Safety Act.

Emergency Care Information Center
P. O. Box 475
Wilton, Connecticut 06897
(203) 762-3911

Note: Offers Medical 911, a monthly update on EMS-related media and periodicals.

Emergency Care Research Institute
5200 Butler Pike
Plymouth Meeting, Pennsylvania 19462
(215) 825-6000

Note: Publishes research and updates on health-related devices and technology.

Emergency Nurses Association
666 North Lake Shore Drive
Chicago, Illinois 60671
(312) 649-0297

EMS Management Institute
P. O. Box 102
Sterling, VA 22170
(703) 450-6097

EMS Management Institute (Cont.)

Note: *Information clearing house specifically on EMS Management, publishes "Mutual Aid Newsletter", conducts seminars.*

Emergency Management Institute
National Emergency Training Center
Federal Emergency Management Agency
16825 South Seton Avenue
Emmitsburg, Maryland 21727
(301) 447-6771

Note: *"Pre-Hospital Response to Radiation Accidents" course; "Introduction to EMS" course; funded A.C.E.P. "Disaster Planning and Management for Emergency Physicians" course.*

Emergency Medical Management Association
1101 Connecticut Avenue, NW, Suite 700
Washington, DC 20036
(202) 857-1146

Note: *Addresses administration in the field of emergency medicine, publishes "Lifeline" newsletter, conducts workshops.*

Emergency Medical Residents' Association
P. O. Box 61911
Dallas, Texas 75261
(214) 659-0920

Federal Emergency Management Agency
National Fire Academy
National Emergency Training Center
16825 South Seton Avenue
Emmitsburg, Maryland 21727
(301) 447-6771

Note: *Resident 2-week course, (Management of EMS for the Fire Service); Field 2-day course (EMS Administration)*

Health Education Media Association
P. O. Box 771
Riverdale, Georgia 30274

Indian Health Services
Clinical Support Center
4212 North 16th Street
Phoenix, Arizona 85016
(602) 263-1581

Note: *Provides technical consultation, training and some financial support to Native American EMS programs.*

International Association of Business Communicators
870 Market Street, Suite 940
San Francisco, CA 94102

International Association of Fire Chiefs
1329 18th Street, NW
Washington, DC 20036
(202) 833-3420

Note: *Offers management seminars.*

International Association of Firefighters
1750 New York Avenue, NW
Washington, DC 20006
(202) 872-8484

Note: *Co-sponsored the EMT Apprenticeship program, and Open Learning program.*

International Association of Quality Circles
P. O. Box 30635
Midwest City, Oklahoma 73140

International Federation of Training and Development Organizations
923 State Street
St. Joseph, Missouri 49085

International Society of Fire Service Instructors, EMS Instructor Section
20 Main Street
Ashland, Massachusetts 01721
(617) 881-5800

Note: *EMS instructor section formed March 1981, publishes "EMS Section News".*

National Association of Emergency
  Medical Technicians
Society of EMS Administrators
P. O. Box 414
Boulder, Montana 59632

Note: *Seminar programs, annual Educational*
        Conference; also maintains a job "bank".

National Association for Continuing & Adult
  Education
1201 16th Street, NW
Washington, DC 20036

National Association of State EMS Directors
Office of Emergency Medical Services
Department of Health and Social Services
482 Hathaway Building, Room 528
Cheyenne, Wyoming 82002
(307) 777-7955

National Audio-Visual Association
3150 Spring Street
Fairfax, Virginia 22031

National Center for Health Education
211 Sutter Street, Fourth Floor
San Francisco, California 94108

National Computer Graphic Association
8401 Arlington Boulevard
Fairfax, Virginia 22031

National Council of State EMS
  Training Coordinators
Emergency Medical Services Bureau
State Department of Health and
  Environmental Sciences
Cogswell Building
Helena, Montana 59601
(406) 449-3895

National Education Association
1201 16th Street, NW
Washington, DC 20036

National Registry of Emergency
  Medical Technicians
P. O. Box 29233
Columbus, Ohio 43229

Note: *Recognized in many states as either the*
        EMT certification body or as an accept-
        able means of reciprocal certification.

National Safety Council
444 North Michigan Avenue
Chicago, Illinois 60611

National Technical Information Service
5285 Port Royal Road
Springfield, Virginia 22161
(703) 487-4600

Note: *Computer search facilities available.*

Society of Teachers of Emergency Medicine
P. O. Box 61911
Dallas, Texas 75261
(214) 659-0921

Speech Communication Association
5105 Backlick Road
Annandale, Virginia 22003

The Foundation Center
888 Seventh Avenue
New York, New York 10019

Note: *Information on foundations which may*
        be funding sources.

The Grantsmanship Center
1031 S. Grand Avenue
Los Angeles, California 90015
(213) 749-4721

Note: *Information on the process of obtaining*
        grants.

United States Fire Administration
National Emergency Training Center
16825 South Seton Avenue
Emmitsburg, Maryland 21727
(800) 638-9600

Note: Rockville Report; funded: <u>Fire Service/EMS Program Management Guide</u>, Technical Support Services (free problem solvers/consultants), "Born of Necessity" Conferences, EMS Resource Center, etc.

United Way of America
Gifts-in-Kind Program
701 North Fairfax Street
Alexandria, VA 22314-2088

University Association for Emergency Medicine
3900 Capitol City Boulevard
Lansing, Michigan 48906
(517) 485-5484