

SNF Volunteer Engagement Project

**Exhibit A**  
Scope of Work

**1. Service Overview**

Contractor agrees to develop a robust volunteer program at twenty skilled nursing facilities in California; create a professional “how-to” video and comprehensive state-specific handbook for skilled nursing facilities interested in creating and sustaining a volunteer program; and identify “positive person-centered” practices supported by volunteers from facilities and then incorporate a minimum of five practices in an “idea guide” available to all interested facilities.

The California Department of public health is sponsoring a 30 Month project entitled “Volunteer Engagement in Skilled Nursing Facilities” for the purpose of increasing the customer services available to residents of skilled nursing facilities. The volunteers are non-facility personnel who may have contact with residents, staff and visitors.

**2. Progress Reports or Meetings**

- A. Contractor shall submit quarterly progress reports and attend monthly meetings with the state contract manager liaison so that the contractor is provided support and to ensure the Contractor is on track to meet project deliverables. The meetings will be focused on reviewing interim findings and afford occasions for airing difficulties or special problems encountered so that remedies can be developed quickly.
- B. At the conclusion of this agreement the Contractor shall convene a meeting to present findings, conclusions, and recommendations. Contractor shall submit a comprehensive final report no later than the contract expiration date or a date mutually agreed upon with Program Project Manager.

**3. Services to be Performed**

Contractor shall perform the following services:

Goal 1: Project Development

- A. Objective 1: Project Development:
  - 1) Timeline: July 1, 2018 to December 31, 2018.
  - 2) Tasks:
    - a) Hire a consultant, with a background in nursing home operations and communications.
    - b) Convene an advisory group that may consist of representatives from the LTC Ombudsman program, an organization that utilizes volunteers to serve elders, and administrative and recreation professionals from California Skilled Nursing Facilities.
    - c) Gather resources, create materials, and design a technical support component.
    - d) Recruit five pilot facilities.
      - i. Recruit a diverse sample of Skilled Nursing Facilities with target towards facilities that have organizational maturity and commitment to fulfill the program, including “high functioning” facilities through Contractor and Leading Age Publications.
      - ii. Invite at least thirty SNFs, through Contractor and Leading Age, and conduct a project recruitment webinar.

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3) Deliverables:

- a) Due by July 31, 2018, via email or hardcopy:
  - i. Provide CDPH with consultant's name and agreement.
  - ii. Description of consultant's role and expectations.
  - iii. Provide CDPH with advisory group members, frequency of meetings, and expected tasks.
- b) Due by December 31, 2018:
  - i. Provide CDPH with a hard copy of created materials.
  - ii. Provide CDPH a list of at least thirty SNF facilities contacted.
  - iii. Provide CDPH a list of the five pilot facilities and method used for selection.

B. Objective 2: Pilot and Follow Up

1) Timeline: January 1, 2019 to June 30, 2019.

2) Tasks:

- a) Launch meeting with five pilot facilities
  - i. To complete an overall assessment and development of a written work plan for volunteer engagement through community outreach.
  - ii. Have staff complete pretest in order to demonstrate their knowledge of an effective volunteer engagement program.
  - iii. Program development in each pilot facility, engaging family and resident councils as part of the development.
  - iv. Assist to identify the program focus based on their residents' needs and the community culture.
  - v. Include a variety of projects with examples of intergenerational, multi-ethnic, community based and individual relationship programs.
  - vi. Provide a handbook consisting of draft training materials including sample volunteer forms, policies and procedures, with instructions regarding adherence to state requirements for health screening and mandated abuse training, and other regulatory guidance and references.
- b) Follow up meeting with five pilot facilities
  - i. Have staff complete posttest in order to demonstrate their knowledge of an effective volunteer engagement program.
  - ii. Facilities will have completed three goals outlined in their work plan and convene at least one volunteer meeting.
  - iii. Staff champion will have attended a series of training webinars provided by Contractor to learn the fundamentals of establishing an effective volunteer program.
  - iv. Gather feedback on the draft handbook.
- c) Recruit additional five facilities with varying levels of five star ratings and demographics, using Contractor and Leading Age information and facility interest generated by informational webinar.
- d) Host ongoing webinars and support calls for staff and volunteers.

3) Deliverables:

- a) Due by January 31, 2019:
  - i. Provide launch meeting and follow up meeting date(s) and agenda items via email.
  - ii. Provide webinar and/or support call dates and topics via email.

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- b) Due by June 31, 2019:
  - i. Provide revised handbook and training materials from feedback received via hardcopy.
  - ii. Provide a list of five additional facilities selected, including the facilities five star rating and demographics, via email.
  
- C. Objective 3: Launch and Follow up:
  - 1) Timeline: July 1, 2019 to December 31, 2019.
  - 2) Tasks:
    - a) Launch meeting with five facilities
      - i. To complete an overall assessment and development of a written work plan for volunteer engagement through community outreach.
      - ii. Have staff complete pretest in order to demonstrate their knowledge of an effective volunteer engagement program.
      - iii. Program development in each pilot facility, engaging family and resident councils as part of the development.
      - iv. Assist to identify the program focus based on their residents' needs and the community culture.
      - v. Include a variety of projects with examples of intergenerational, multi-ethnic, community based and individual relationship programs.
      - vi. Provide a handbook consisting of draft training materials including sample volunteer forms, policies and procedures, with instructions regarding adherence to state requirements for health screening and mandated abuse training, and other regulatory guidance and references.
    - b) Follow up meeting with five facilities
      - i. Have staff complete post-test in order to demonstrate their knowledge of an effective volunteer engagement program.
      - ii. Facilities will have completed three goals outlined in their work plan and convene at least one volunteer meeting.
      - iii. Staff champion will have attended a series of training webinars provided by Contractor to learn the fundamentals of establishing an effective volunteer program.
      - iv. Gather feedback on the draft handbook.
    - c) Recruit additional five facilities with varying levels of five star ratings and demographics, using Contractor and Leading age information and facility interest generated by informational webinar.
    - d) Host ongoing webinars and support calls for staff and volunteers.
  - 3) Deliverables:
    - a) Due by July 31, 2019:
      - i. Provide launch meeting and follow up meeting date(s) and agenda items via email.
      - ii. Provide webinar and/or support call dates and topics via email.
    - b) Due by December 31, 2019:
      - i. Provide revised handbook and training materials from feedback received via hardcopy.
      - ii. Provide a list of five additional facilities selected, including the facilities five star rating and demographics, via email.

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D. Objective 4: Launch and Follow up:

1) Timeline: January 1, 2020 to June 30, 2020.

2) Tasks:

a) Launch meeting with five facilities

- i. To complete an overall assessment and development of a written work plan for volunteer engagement through community outreach.
- ii. Have staff complete pretest in order to demonstrate their knowledge of an effective volunteer engagement program.
- iii. Program development in each pilot facility, engaging family and resident councils as part of the development.
- iv. Assist to identify the program focus based on their residents' needs and the community culture.
- v. Include a variety of projects with examples of intergenerational, multi-ethnic, community based and individual relationship programs.
- vi. Provide a handbook consisting of draft training materials including sample volunteer forms, policies and procedures, with instructions regarding adherence to state requirements for health screening and mandated abuse training, and other regulatory guidance and references.

b) Follow up meeting with five facilities

- i. Have staff complete posttest in order to demonstrate their knowledge of an effective volunteer engagement program.
- ii. Facilities will have completed three goals outlined in their work plan and convene at least one volunteer meeting.
- iii. Staff champion will have attended a series of training webinars provided by Contractor to learn the fundamentals of establishing an effective volunteer program.
- iv. Gather feedback on the draft handbook.

c) Recruit additional five facilities with varying levels of five star ratings and demographics, using Contractor and Leading age information and facility interest generated by informational webinar.

d) Host ongoing webinars and support calls for staff and volunteers.

3) Deliverables:

a) Due by January 31, 2020:

- i. Provide launch meeting and follow up meeting date(s) and agenda items via email.
- ii. Provide webinar and/or support call dates and topics via email.

b) Due by June 31, 20120:

- i. Provide revised handbook and training materials from feedback received via hardcopy.
- ii. Provide a list of five additional facilities selected, including the facilities five star rating and demographics, via email.

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E. Objective 4: Wrap Up

- 1) Timeline: July 1, 2020 to December 31, 2020.
- 2) Tasks:
  - a) Launch meeting with five facilities
    - i. To complete an overall assessment and development of a written work plan for volunteer engagement through community outreach.
    - ii. Have staff complete pretest in order to demonstrate their knowledge of an effective volunteer engagement program.
    - iii. Program development in each pilot facility, engaging family and resident councils as part of the development.
    - iv. Assist to identify the program focus based on their residents' needs and the community culture.
    - v. Include a variety of projects with examples of intergenerational, multi-ethnic, community based and individual relationship programs.
    - vi. Provide a handbook consisting of draft training materials including sample volunteer forms, policies and procedures, with instructions regarding adherence to state requirements for health screening and mandated abuse training, and other regulatory guidance and references.
  - b) Follow up meeting with five facilities
    - i. Have staff complete posttest in order to demonstrate their knowledge of an effective volunteer engagement program.
    - ii. Facilities will have completed three goals outlined in their work plan and convene at least one volunteer meeting.
    - iii. Staff champion will have attended a series of training webinars provided by Contractor to learn the fundamentals of establishing an effective volunteer program.
    - iv. Gather feedback on the draft handbook.
  - c) Host ongoing webinars and support calls for staff and volunteers.
  - d) Document at least five examples of the successful person-centered care projects utilizing volunteers in Idea Guide.
  - e) Production and marketing of volunteer program.
  - f) Produce "How To" video for Skilled Nursing Facilities.
  - g) Finalize and disseminate *Engaging Volunteers in Skilled Nursing Facilities Handbook* and Idea Guide.
  - h) Final evaluation and reporting.
  - i) Consultant wrap-up.
- 3) Deliverables: Due December 31, 2020:
  - a) Five examples of successful person-centered care utilizing volunteers.
  - b) Provide the "How To" video.
  - c) Provide the *Engaging Volunteers in Skilled Nursing Facilities Handbook* and Idea Guide.
  - d) Final evaluation of the program.

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**4. Reporting Requirements**

- A. Provide a performance timeline and status points for all activities included in this contract.
- B. Provide status updates via teleconference or during an in person meeting on a quarterly basis starting with the execution of the contract.
- C. Provide a report, summarizing the data and analysis for each objective. Each report shall be submitted to the CDPH Contract Representative 30 days after each goal is completed.
- D. Contractor shall submit written quarterly reports to the CDPH/Licensing and Certification program regarding program operations and submit any and all requested data or information upon request. The reports shall include relevant data tables representing the status of facilities enrolled and sustainment as well as pilot test results.

**5. Subcontractor Requirements**

- A. All subcontracting must comply with the requirements of the State Contracting Manual, Sections 3.03, 3.06, 3.18, and 4.04, as applicable.

**6. CDPH Responsibilities**

CDPH agrees to provide the following services:

- A. Review and provide feedback of the performance timeline within 10 business days of receipt.
- B. Schedule and attend meeting updates in person or via teleconference and reserve meeting space or provide teleconference resources.
- C. Review reports and materials submitted by Contractor and provide feedback within 10 business days.