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PROGRAM BENCHMARKS

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·PLANNING TOOL

FIRST *EDITION*

**2002**

## ICA PROGRAM BENCHMARKS & PLANNING TOOL

*Directions*

The *ICA Program Benchmarks and Planning Tool* is designed to help leaders of interfaith volunteer caregiving programs (program directors and their Board Chair or the whole board) assess how their program is doing in seven different areas. It's designed to help you identify any areas you think need improvement, and then develop your own plan and timeline for doing what you think your program needs.

ICA realizes that all our member programs are unique; yet share many common characteristics and concerns. *All of our programs are constantly working to provide quality care and be the best they can be.* The Benchmarks are organized in seven areas (A-G), and come from many sources- The best practices of some of our successful ICA member programs, other non-profit organizations, and the literature from authoritative sources such *as* BoardSource and the American Society of Association Executives. Some

of the Benchmarks are *basic,* or *minimal* while others describe more advanced operations

and structures that your program may not yet have achieved.

*1. Using the Tool:* We strongly recommend that a team, or a small group, work together to complete the assessment and make an improvement plan. As General Eisenhower once said, *"Plans are nothing. Planning is everything."* Probably the greatest value of this tool is the sharing of ideas within your own program about *the way things are,* and

the way they *could or should be. Yourfirst step is to decide how you can use this tool to benefit your program, and who will work on it with you!*

1. *Getting started is easy!* After reading each Benchmark statement, simply check -

../ Yes -to indicate that your program meets or exceeds the benchmark

../ No -to indicate that your program does not meet the Benchmark, or

../ ? -to indicate that you either have questions about the Benchmark or you don't know whether or not it describes your program. This mark indicates you may need more information, more discussion, or you may decide to wait and address this area later.

1. *Make notes about each Benchmark as you go through the TooL* A special NoTEs section is provided on each page to capture your initial thoughts about the Benchmarks. The notes can be about anything important to you such *as* people to contact, documents to check, questions to ask, etc. For those Benchmarks you've checked- No- it would be important to ask whether or not you believe the Benchmark is important for your organization. If you believe it is, then try to capture your initial thoughts about what changes you think are needed in order to make the Benchmark statement true for your program.
2. *Useyour notes to make a Draft Improvement Plan.* The last two pages of the Tool are labeled PLANNING SUMMARY. Using your notes *as* a guide you can identify what areas are most important now for your program, and begin to consider strategies. Ask yourself: Which areas do we consider priorities? Can we set meaningful goals and

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#### ICA PROGRAM BENCHMARKS & PLANNING TOOL

##### timetables? Can we identify the individuals or groups who can help us with these areas? Do we have the resources we need or can we get them?

1. *Contact ICA if you have questions or need help:* Contact Mike Lawler, Director of Education and Professional Advancement by email at mik.e@interfaithcaregivers.org

##### Finally, you should know that we've named this the *First Edition* for a reason: it is truly a work in progress. We need to hear from you about anything you think we left out, or anything you think we should get rid of: in this tool. Please let us know about any areas

that need more explanation, and any ideas you have for making it more useful. We'd also

appreciate hearing from you if you find it helpful, or if there are other "tools" you'd like to have that ICA could develop for you.

We send you our best wishes for the continued success of your program!

Thank you very much.

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ICA **PROGRAM BENCHMARKS & PLANNING TOOL**

* 1. COALITION BENCHMARKS

I Yes I No I ? I 1. Your coalition reflects the diversity of faith-based organizations in your

community.

I Yes I No I ? 2. Your coalition IS a community network of faith-based organizations working in partnership with community leaders, community organizations, and health and human service agencies.

I Yes I No I ? 3. Clear plans that include objectives and timelines have been established for expanding the coalition so as to achieve the desired composition, or for maintaining the desired composition if it has been attained.

|  |  |  |
| --- | --- | --- |
| I Yes I No I ? | 4. | Coalition meetings are held on a regularly scheduled basis, are well |
|  |  | attended, and are managed effectively . |
| I Yes I No I ? | 5. | Coalition members provide referrals of care recipients and volunteers to the program. |

I Yes I No I ? 6. Coalition members support the program financially and/or with in-kind contributions.

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

B. GOVERNANCE+ BENCHMARKS

GOVERNANCE: *Structure* & *Composition*

I Yes I No I ? it. Board composition reflects the diversity of race, faith and culture found within the community. The Board includes representation from key community organizations or agencies as well as the faith community . Board includes members with special expertise; e.g., accountants, lawyers, fundraising experts, media/communications experts.

I Yes I No I ? I 2. If a 50lc3 needs to be created, the Board is actively pursuing it, a timeline has been established, and the assistance needed to accomplish this goal has been secured.

I Yes I No I ? I 3. Whether the program IS 1ts own 50lc3, or is organized under another agency, the program meets the legal and regulatory requirements governing non-profit organizations in the state in which its located.

I Yes I No I ? ,4.

The program, or its parent organization, has officers and directors insurance for the Board.

+ Note: *Governance applies to your organization's governing body, whether it's called a Board of*

*Directors, Board ofTrustees, Advisory Council, or some other term. We use the term Board in reference to all governing bodies.*

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

B. GOVERNANCE BENCHMARKS- CONT'D.

GOVERNANCE: *Role & Function*

I Yes I No I ? 5. The role and function of Board members and staff are clearly outlined in writing and followed in everyday practice .

I Yes I No I ? 6. The working relationship between staff and Board ts one of true partnership.

I Yes I No I ? 7. The Board understands its legal accountability as the steward of the program and its resources.

I Yes I No I ? 8. All Board members know and support the program's mission and they articulate the mission and goals to the community.

I Yes I No I ? 9. Board members make a financial contribution to the Program and they assist with fundraising.

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

B. GOVERNANCE BENCHMARKS- CONT'D.

GOVERNANCE: *Board Meetings*

I Yes I No j? Ito.

I Yes I No I ? ln.

I Yes I No I ? lt2.

##### Board meetings occur on a regular basis. They are well m naged and well­ attended and produce results that help the program achieve its goals.

The Board has a committee structure and members serve actively. Committees have written "job descriptions". Task forces have a scope of

work approved by the Board . Committees and task forces are given

specific objectives and timelines.

I Yes I No I ? I tJ. Official minutes are kept of all meetings . Following their approval, minutes are signed by the Board Secretary and filed for permanent record.

# NOTES

GOVERNANCE: *Board Development*

##### I Yes I No I ? lt4. There is an established orientation process for new Board members . The orientation is used regularly and it is effective."

I Yes I No I ? Its. The Board regularly assess its own performance and takes corrective action as necessary.

jYes I No I? Jt6. Board members periodically engage in planning and development exercises to improve Board performance.

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

C. PROGRAM & FISCAL MANAGEMENT BENCHMARKS

PROGRAM & FISCAL MANAGEMENT: *Records*

Accurate, up-to-date records are maintained related to :

I Yes I No I ? jta. participating coalition members

j Yes I No I ? lib. volunteers, including the types and frequency of services they provide

I Yes I No I ? lie. persons being served

j Yes I No 1 ? 11d. human resources (personnel records)

I Yes I No I ? lie. insurance and vendor contracts

l Yes I No I ? ju. budgets

j Yes I No I ? llg. grant reports

# NOTES

PROGRAM & FISCAL MANAGEMENT: *Budgets*

I Yes I No I ? I 2. The Board approves a budget that is consistent with the goals and objectives of the organization and is adequate to achieve them.

I Yes I No I ? I 3. Staff understand how to organize and monitor the budget and use it as a tool to improve program performance

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

C. PROGRAM & FISCAL MANAGEMENT BENCHMARKS- CONT'D

PROGRAM & FISCAL MANAGEMENT: *Financial Reporting*

I Yes I No I ? 4. The staff and Board review monthly financial statements of program assets, income and expenses.

I Yes I No I ? 5. There are sound policies for handling money, making purchases, writing checks and paying bills on time.

I Yes I No I ? 6. Accounting software is used to prepare accurate and timely ·financial reports .

# NOTES

PROGRAM & FISCAL MANAGEMENT: *Human Resources*

I Yes I No I ? 7. Staff resources (including paid and/or unpaid) are sufficient to accomplish the program's goals and objectives .

j Yes I No I ? 8. Staff compensation is similar to that of other positions in the community that have similar educational & experiential requirements and levels of responsibility .

I Yes I No I ? 9. The number of staff and the number of paid work hours are adequate to meet the needs ofthe program .

I Yes I No I ? Ito. There is a plan for assessing staff performance that is tied to the overall plan for the program.

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

C. PROGRAM & FISCAL MANAGEMENT BENCHMARKS- CONT'D

PROGRAM & FISCAL MANAGEMENT: *Networking and Professional Development*

I Yes I No I ? I 11. The Program Director regularly attends the national ICA Annual Conference .

I Yes I No I ? I 12. The Program Director regularly checks the *Members Only* area of the ICA website, and the *Faith in Action* Extranet website, for important news and helpful resources .

I Yes I No I ? I 13. One or more Board members regularly attend the ICA Annual Conference.

I Yes I No I ? I 14. The Program Director and one or more Board members regularly attend Faith in Action and/or other statewide or regional meetings of caregiving program leaders.

# NOTES

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ICA PROGRAM BENCHMARKS & PLANNING TOOL

D. STRATEGIC PLANNING & PROGRAM EVALUATION BENCHMARKS

##### feedback measures, f) volunteer and care recipient retention rates in the program, g) etc.

|  |  |  |
| --- | --- | --- |
| I Yes I No I ? | 1. | A strategic plan has been developed and is used to guide decision-mak ing with respect to the allocation of fiscal and human resource. |
| I Yes I No I ? | 2. | The strategic plan contains measurable goals, specific· objectives and |
|  |  | timelines . |
| I Yes I No I ? | 3. | The strategic plan is evaluated frequently and revised as needed throughout the year to assess progress and to assure it reflects the changing needs of |
|  |  | the program . |
| I Yes I No I ? | 4. | The Board participates significantly and meaningfully m a strategic |
|  |  | planning process. |
| I Yes I No I ? | 5. | Outcome measures for program objectives are used to improve decision- |
|  |  | making. Measures include, for example : a) number of volunteers, b) hours |
|  |  | and types of service provided, c) number of care recipients served, d) care |
|  |  | recipient and volunteer satisfaction measures, e) community and Board |

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

E. FUNDRAISING BENCHMARKS

F'UNDRAISING: *Board Policies & Legal Requirements*

I Yes No ? 1. All legal requirements for raising funds in the program 's home state have been met, and for other states if internet solicitation is being done.

I Yes I No I ? 2. The Board has established policies that identify the types of donations that will be accepted by the organization, and how, when, and by whom donors will be acknowledged.

# NOTES

FUNDRAISING: *Plans*

 I No I ? I 3. A *Case Statement* for program support has been developed . It answers anticipated donor questions such as: What are your goals? Why is your program important and unique? Funding needed? Evaluation plans?

I Yes I No I ? 4. A comprehensive fundraising plan has been developed and Board leaders are committed to achieving its goals. The plan includes :

I Yes I No I ? I 4a. the names of specific funding sources (individuals, businesses ,

foundations, special events)

I Yes I No I ? I 4b. the solicitation approach to be used for each source

I Yes I No I ? I 4c. specific responsibilities and assignments for staff and Board members

I Yes I No I ? I 4d. timelines and reporting procedures

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

E. FUNDRAISING BENCHMARKS: CONT'D

FuNDRAISING: *Acknowledging, Accounting, and Reporting*

I Yes I No I? 5. There is a process in place for safely handling and accounting for all donations received .

I Yes I No I ? I 6. An independent audit is done annually .

I Yes I No I ? 7. Donations and gifts are acknowledged in no more than 3-5 business days and appropriate tax documentation is provided to donors.

I Yes I No I? I 8. The Board approves an annual report that highlights accomplishments and cites the sources and amounts of donations received .

j Yes I No I? I 9. The annual report is distributed to donors and supporters.

# NOTES

F'UNDRAISING: *Board Participation*

I Yes I No I ? Ito. All Board members make an annual financial gift to the program according to their means .

I Yes I No I ? 111. Board members actively participate in fundraising.

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

F. COMMUNICATIONS & COMMUNITY RELATIONS BENCHMARKS

COMMUNICATIONS & COMMUNITY RELATIONS: *Planning*

l Yes I No I ? I I. A marketing plan has been created for informing the community at large, as well as specific target groups within the community , incloding :

I Yes I No I ? I la. the faith community leadership and clergy

I Yes j No 1 ? 11b. service and health-care organizations

!Yes I No I? I lc. those who need care, potential donors, and volunteers

This marketing plan includes clear statements regarding :

I Yes I No j? I 2a. communications and marketing objectives

j Yes I No I ? j 2b. The methods for accomplishing the objectives

I Yes I No I ? I *zc.* The hoped-for benefits of achieving each objective

I Yes I No I ? I 2d. estimated expenses

I Yes I No I ? I 2e. sources of funding for each expense.

I Yes I No I ? I 3. The marketing plan is being successfully implemented according to timelines approved by the Board .

# NOTES

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#### ICA PROGRAM BENCHMARKS & PLANNING TOOL

F. COMMUNICATIONS & COMMUNITY RELATIONS BENCHMARKS- CONT'D

COMMUNICATIONS & COMMUNITY RELATIONS: *Print Material*

I Yes I No I ? I 4. The program has a recognizable name and logo.

|  |  |  |
| --- | --- | --- |
| I Yes I No I ? | 5. | The mission statement is one or two sentences long and clearly |
|  |  | communicates what the program is about. |
| I Yes I No I ? | 6. | Effective print materials are used to tell the program story, to recruit volunteers, and to inform potential care recipients. |

# NOTES

COMMUNICATIONS & COMMUNITY RELATIONS: *Media Relations*

I Yes I No I ? 7. Press releases are created including those for special events or program activities that are newsworthy . Releases are used with an identified list of media contacts within the community .

I Yes I No I ? I 8. Media spokespersons have been identified and a protocol is established for dealing with media inquiries.

I Yes I No I ? 9. Spokespersons can give effective interviews and foster positive media relations.

I Yes I No I ? I 10. A press file has been created and is used to highlight the program with donors, visitors, and those who request information .

# NOTES

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ICA **PROGRAM BENCHMARKS & PLANNING TOOL**

F. COMMUNICATIONS & COMMUNITY RELATIONS BENCHMARKS- CONT'D

COMMUNICATIONS & COMMUNITY RELATIONS: *Newsletters*

I Yes I No I ? 11. A newsletter is distributed to the Board, recipients, volunteers and the community at least 2-4 times per year. The newsletter:

I Yes I No I ? Ina. Cites program accomplishments

I Yes I No I ? lnb. Explains program needs

I Yes I No I ? Inc. Acknowledges contributions of donors and volunteers

I Yes I No I ? llld. Includes thank you letters from care recipients

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

G. VOLUNTEER BENCHMARKS

VOLUNTEERS: *Identification & Screening*

I Yes I No I ? 1. The program has identified volunteer sources, has effectively recruited volunteers, and has an ongoing plan for volunteer recruitment.

I Yes I No I ? 2. Volunteer recruiters are fully aware of the mission and purpose of the program, are positive and enthusiastic about the program, and are knowledgeable about local faith communities, community needs and resources.

I Yes I No I ? 3. Needs of volunteers are identified, respected, and a fundamental consideration in the entire service mission . Expectations are clearly · defined and communicated; there are direct lines of communication with program staff; there are opportunities for sharing with other volunteers.

I Yes I No I ? 4. A Board-approved process for volunteer screening and reference checks is completed prior to acceptance of volunteers into the program.

# NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

G. VOLUNTEER BENCHMARKS- CONT'D

VOLUNTEERS: *Orientation* & *Training*

[Yes I No I ? 5. Volunteers are given job descriptions and Board-approved policies regarding:

[Yes I No I ? I Sa. treatment of care recipients and their families

I Yes I No I ? I Sb. handling of client property

I Yes I No I ? I Sc. acceptance of client funds or gifts

I Yes I No I ? I Sd. regulations regarding the driving of vehicles and transporting others

I Yes I No I ? I Se. handling emergency medical situations

I Ycs I No I ? \ Sf. other relevant program policies that impact the work of the volunteer

I Yes I No I ? 6. A volunteer training program is in place and is completed prior to the provision of services by volunteers. It has training objectives, relevant learning exercises and an evaluation process that focuses on volunteer achievement of stated objectives .

I Yes I No I ? 7. The training is provided by one or more capable and experienced trainers .

I Yes I No I ? 8. There is a plan and process in place for providing training updates at least annually to all volunteers .

# NOTES

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### ICA PROGRAM BENCHMARKS & PLANNING TOOL

G. VOLUNTEER BENCHMARKS- CONT'D

VOLUNTEER: *Management*

I Yes I No I ? 9. Volunteers are matched with those in need. The matching process is informed by accurate information, including: a) listing. of community resources; b) volunteer information obtained at registration; and

c) profile ofperson needing care.

l Yes I No I ? IIO. Volunteers, their services, and their hours, are tracked systematically, preferably with the use of computerized software. Regular and periodic reports are generated and used by staff and Board to analyze the program's progress and needs related to volunteer management.

I Yes I No I ? I 11. Both formal and informal recognition for volunteer service is thoughtfully considered by the Board and provided at regular intervals in ways that are meaningful to every volunteer.

# I NOTES

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

# PLANNING SUMMARY

Date: ---

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## ICA PROGRAM BENCHMARKS & PLANNING TOOL

# PLANNING SUMMARY- CONT'D

Date: ----

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