

**Omega Leo Medical Explorer Post 4077, San Marcos, Texas  
Capitol Area Council, Scouting America (Boy Scouts), and  
Lions Clubs International**

**Standard Operating Procedure 0010.21.01 – Performance Review of Officers  
and Liaisons with Volunteer Responsibilities**

**Prepared or Last Modified**

Originally prepared by Charles Johnson, PhD, Senior Omega Leo Medical Explorer Advisor, Post 4077: February 27, 2022

Last modified by Kyler Beaty, BS, Omega Leo Medical Explorer Advisor, Post 4077: June 17, 2023

**Review within the Omega Leo Medical Explorer Post 4077**

Reviewed by the Omega Leo Vice-President of Systems: June 19, 2024

Reviewed by the Omega Leo Vice-President of Operations: June 20, 2024

Reviewed by the Omega Leo Medical Explorer President’s Council: **Needs Review**

**Review by Senior Omega Leo Medical Explorer Advisor for Consistency with Other Existing Policies**

Last Reviewed by Charles Johnson, PhD, Senior Omega Leo Medical Explorer Advisor: November 16, 2023

**Review by Agencies Outside of Omega Leo Medical Explorer Post 4077**

None

**Omega Leo Medical Explorer Officer or Advisor with Annual Review Responsibility**

Omega Leo Medical Explorer President, **Review Month: August**

**Those with responsibilities in this SOP include:**

1. All Officers with Supervisory Responsibilities of others who have volunteer responsibilities
2. Omega Leo Medical Explorer Vice President of Operations
3. Omega Leo Medical Explorer Vice President of Systems
4. Omega Leo Medical Explorer President
5. Senior Omega Leo Medical Explorer Advisor

**Other Standard Operating Procedures Referenced or Impacted by Changes in this SOP:**

SOP 0010.10.01 Leadership Principles for All Omega Leo Medical Explorer Officers and Liaisons

SOP 0012.02.01 Reviews of Omega Leo Medical Explorer Officers Reporting to President – **Not yet written**

- SOP 0014.10.01 Reviews of Omega Leo Medical Explorer Officers Reporting to the VP Operations –  
Not yet written
- SOP 0015.10.01 Reviews of Omega Leo Medical Explorer Officers Reporting to the VP Systems –  
Not yet written
- SOP 0400.10.01 Reviews of Omega Leo Medical Explorer Officers Reporting to the Chief Volunteer  
Coordinator – Not yet written
- SOP 0460.01.00 Reviews of Liaisons Reporting to the Health Professions, Physician, & Dental  
Coordinator – Not yet written
- SOP 091.01.00 Reviews of Liaisons Reporting to the Hospital and Hospice Coordinator – Not yet  
written
- SOP 130.01.00 Reviews of Liaisons Reporting to the Non-Hospital/Non-Medical Volunteer  
Coordinator – Not yet written

The procedures and requirements related to the performance evaluations of officers and liaisons with volunteer responsibilities are as follows:

### I. Purpose

1. All officers or liaisons with responsibilities for managing our many volunteer opportunities have several things in common when reviewing their responsibilities related to the placement and control of **volunteer opportunities** open to our Omega Leo Medical Explorers.
2. This SOP outlines the common performance review factors to be used by all Omega Leo Medical Explorers officers who may have responsibility for oversight of other Officers or Liaisons who have **volunteer responsibilities**.
3. Under the current organizational structure of our Omega Leo Medical Explorers, the Vice-President of Systems **has only two officers responsible for volunteer placements – the Princess Program Coordinator and the Lion Kidsight Coordinator**. These positions are temporarily dormant due to the pandemic or membership counts but are expected to open sometime during the spring or summer of 2025. A Medical Explorer member who desires to have either of these areas of responsibility should be working with Senior Omega Leo Medical Explorer Advisors to open the areas for volunteer assignments.
4. The Vice-President of Operations has one officer responsible for volunteer placements reporting directly to them – the Chief Volunteer Coordinator. Both vice presidents are, however, responsible for ensuring that all officers and liaisons who report through their line of authority with volunteer responsibilities are reviewed on a regular basis using the common factors listed below. The Vice-President of Operations may assist the Chief Volunteer Coordinator in the review of selected officers or liaisons in their line of authority that they consider critical to our success or improvement.
5. The Chief Volunteer Coordinator, in turn, has three Assistant Officers responsible for volunteer placement who also have others reporting to them with volunteer responsibility – 1)Health Professional Shadow, Physician and Dentist Coordinator, 2) Hospital/Hospice Coordinator, and 3) the Non-Hospital/Non-Medical Coordinator. **The review reports for these three officers are to contain the detail for the below factors passed through for all positions below them. No**

**accumulations across positions are needed.** There should be **reportable efforts** by the Chief Volunteer Coordinator to assist these lower-level officers in the performance of their duties.

6. In addition, the Chief Volunteer Coordinator has Assistants or Liaisons with volunteer responsibility who do not have others reporting to them – 1) Chief CERT Coordinator, and 2) CMDA Volunteer Coordinator. In the case of these officers, their individual review report has only the information for their position itself.
7. The Hospital Coordinator may have five Liaisons reporting to them who have volunteer responsibility – 1) Liaison Christus Santa Rosa Hospital in San Marcos and New Braunfels, 2) Liaison Scott & White Hospital in Buda, 3) Liaison Christus Santa Rosa Hospital San Antonio, 4) Liaison Ascension Seton Hospital Kyle, and 5) Liaison Guadalupe Valley Hospital Seguin. None of these liaisons have others reporting to them, thus their review reports will only show data for their positions.
8. The Hospice Coordinator may have five area Hospice Liaisons reporting to them – 1) Liaison Christus Santa Rosa Hospice in San Marcos and New Braunfels, 2) Liaison JOL Healthcare/Hospice, 3) Liaison Gentiva Hospice, 4) Liaison Halcyon Hospice in San Marcos and Austin, and 5) Liaison Heart-to-Heart Hospice. Like other liaisons, the review reports for these only show data for their area of responsibility.
9. The Health Professions Shadow, Physician, and Dentist Assistant Coordinator may have three Liaisons reporting to them who have volunteer responsibility – 1) Liaison Red Arena Equestrian Therapy, 2) Liaison EMS Ride-Along, and 3) Liaison Allied Health Professions Shadow Coordinator. Since these liaisons do not have anyone reporting to them with volunteer responsibilities, their review reports only report data for their area of responsibility.
10. The Non-Hospital/Non-Medical Volunteer Assistant Coordinator may have six Liaisons reporting to them who have volunteer responsibility – 1) Liaison Texas Ramps Project, 2) Liaison Special Olympics, 3) Liaison San Marcos First Baptist Church, 4) Liaison Westover Baptist Church, 5) Liaison Police Ride-Along, and 6) Liaison St. John Catholic Church. The SOP with details related to these positions is SOP 0400.40.00. Like other liaisons, the evaluation reports for these only show data for their area of responsibility.

## **II. Frequency and Purpose of Performance Evaluations**

1. A regular schedule is to be established for the performance review, solutions for any problems, and recommendations for improvement. The frequency may be monthly or bi-monthly depending upon the number of positions reporting to the reviewer and the critical nature of the particular position. Some positions may have a performance evaluation on a monthly basis, while others may be bi-monthly. The frequency is to be determined by the supervising officer after seeking recommendations from their superior officers including, ultimately, the President.
2. The purpose of the performance evaluation is not to be punitive. Rather, it is to determine areas to be improved and how the Omega Leo Medical Explorer operational procedures and structure might be improved to better help the officer or liaison being evaluated accomplish their responsibilities more effectively. In other words, “Is there something that our organization can do to make this job easier to achieve its purpose?” Guidelines for management and review are

discussed further in SOP 0010.10.01 Leadership Principles for All Omega Leo Medical Explorer Officers and Liaisons.

3. Some positions may be dormant and unfilled at this time for various reasons such as membership counts or temporary lack of opening the volunteer activity by senior advisors. These positions can be filled if there is enough interest in volunteer activity in these areas. Unfilled liaison positions cannot, for obvious reasons, be evaluated at this time. Anyone desiring to serve in one of these dormant positions should be in communication with the Senior Omega Leo Medical Explorer Advisor as to what needs to be done to open the area of volunteer opportunity. The Omega Leo Medical Explorer officer or liaison may be able to help get this volunteer opportunity open.
4. The list of active officer or liaison positions to be evaluated is developed in consultation between the President and Senior Advisors. In some cases, a position may require action on the part of the Senior Advisors to make the connections needed to open a volunteer opportunity. Once those actions are completed, the Senior Advisor will notify all concerned that the area of volunteer activity is now open and ready for volunteer placement. A liaison will need to be appointed by the President and Vice-President for Operations in consultation with other officers as warranted such as the Chief Volunteer Coordinator.

### **III. Common Elements to be Used in the Performance Evaluations**

1. The Common Elements that are part of the performance evaluation include:
  - a. Number of first-time Omega Leo Medical Explorer volunteers this period.
  - b. Number of total Omega Leo Medical Explorer volunteers active in this area this period with an accumulation for the academic year.
  - c. Percent of volunteers continuing or returning this period and for the year to volunteer after their first experience.
  - d. Identification of the agencies and primary contact for our volunteer opportunity.
  - e. Number and nature of any special efforts or events to promote or encourage participation in a specific volunteer opportunity among our membership. These are what we call “advocacy or cheerleading” events. These could include special discussions of the opportunity during a regular weekly meeting, or a poster or display shown during a regular meeting with engagement in a discussion with members before or after a meeting.
2. Common duties shared by all officers or liaisons with responsibilities for placement and coordination of volunteers include the roles of “**Advocacy or Cheerleading**” related to the specific volunteer opportunity. Efforts to promote and encourage participation by the broader Omega Leo Medical Explorer membership are to be encouraged. These efforts could include, but are not limited to, exhibits set up during regular Medical Explorer meetings to showcase the volunteer activity and list the procedures for getting involved. They may also include special email campaigns to highlight the volunteer activity and the value of the experiences to be gained through volunteering. The types, success, and outcomes of the special efforts should be noted in the performance evaluation. The liaison may help coordinate a full presentation by an agency volunteer coordinator with the Senior Advisor responsible for scheduling speakers for our weekly meetings.
3. An additional section of the performance evaluation should address any procedural or structural changes that could be made within the larger Omega Leo Medical Explorer program to facilitate

outcome measures of the specific volunteer program. Is there anything we can do internally to help improve our member participation in the volunteer opportunity?

4. Lastly, each performance evaluation should ask for information as to the **personal growth** of the officer or liaison. Is the officer or liaison taking advantage of all they can as a member of our Omega Leo Medical Explorers? What special things may have contributed to the preparation of this individual for their future career as a health professional, or what steps may have been taken to improve the future management and administrative skills of the individual? These steps may include participation in a self-study program using extra-class resources such as those available at the university outside of regular classes or other resources outside of the university such as FEMA/CERT, Boy Scout, or Lion International training opportunities. Any classes attended in management or leadership skills should also be listed here.

#### **IV. End-of-Year Review in Late March or Early April**

1. The End-of-Year Review has a different purpose. It is to be a summary of any procedural or structural changes in our Omega Leo Medical Explorer program that might improve the capability or success of the specific officer or liaison to encourage volunteers within their specific volunteer opportunity.
2. Lastly, the End-of-Year Review is an opportunity to make our Omega Leo Medical Explorers an even better organization. Attention is to be given to examination of our process of preparing or training the incoming replacement officer or liaison. Are there any suggestions to make this process better or more effective? Has the transition process worked well? Is there anything we could change as an organization to make this transition more effective next year? Small changes are welcome.

#### **Calendar Considerations:**

1. Performance reviews are to be conducted on a monthly or bi-monthly schedule, with an end-of-year evaluation in late March or early April. A calendar for the scheduled reviews is to be developed by each supervising Omega Leo Medical Explorer Officer in early September and filed with the President and Senior Omega Leo Medical Explorer Advisor before October.

**Note:** All Medical Explorer members, liaisons, and officers are encouraged to comment and suggest changes to any Medical Explorer Standard Operating Procedure (SOP). Suggestions can be directed to the Medical Explorer Vice-President of Systems or our Senior Advisor.