



CALIFORNIA ASSOCIATION OF HEALTH FACILITIES

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## **VOLUNTEER ENGAGEMENT PROJECT**

# How to Create a Robust Volunteer Program in Your Skilled Nursing Facility

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**Version Date: December 2019**

The most up-to-date version of this handbook can be downloaded at  
<https://www.cahf.org/Programs/Special-Programs/Volunteer-Engagement-Project>

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# WHAT IS A VOLUNTEER?

Volunteers give the most valuable gifts - they give themselves and their time. Volunteers in skilled nursing facilities enhance the quality of life for residents through their kindness, patience, and enthusiasm. They help establish connection to the community, which can diminish isolation.

People choose to volunteer for a variety of reasons. For some, it offers the chance to give something back to the community or make a difference to the people around them. For others, it provides an opportunity to develop new skills or build on existing experience and knowledge.

Whatever the reason, volunteers offer an invaluable resource. They are not paid, because their time is priceless.

Volunteer management handbooks often suggest the development of regular weekly positions within programs structured for long term commitment. This does not always reflect the way that many volunteers wish, or are able to participate. Some different types of volunteers include:

## Key Volunteer:

Has a deep connection or loyalty to a particular issue or organization and is more likely to participate consistently over time.

## Pathway Volunteer:

Uses volunteer opportunity as a pathway to employment or to further their own development. Please note that a promise of future employment or expectation of compensation disqualifies a person to be classified as a volunteer in a for-profit organization.

## Episodic Volunteer:

Takes on short term positions defined in hours or days and seeks positions with a product or other sort of outcome so that success is defined.

# HOW CAN VOLUNTEERS HELP IN YOUR SKILLED NURSING FACILITY?

An active volunteer program can offer a great deal to your skilled nursing facility! It can:

- Augment your busy staff
- Provide group and individual interaction with your residents
- Allow you to develop person-centered programming
- Add energy and enthusiasm to your facility
- Establish and maintain continuity with the larger community
- Allow community members to experience a skilled nursing facility in a positive light and with a shared purpose

What types of programs could volunteers help with?

- Individual friendly visiting for isolated/lonely residents
- Assist with larger group activities
- Participation in family/holiday events
- Assist with indirect resident activities, such as downloading music onto MP3 players
- Participate in state-mandated person-centered programs
- Spiritual programs
- Educational/life-enhancing programs



***Volunteer Disclaimer: California state law mandates that volunteers who work in for-profit organizations provide services that are altruistic in nature and that differ from services by paid staff.***

# COMMUNITY ASSESSMENT/VOLUNTEER COORDINATOR

## Community Assessment

One of the best ways to promote volunteerism in your skilled nursing facility is to assess your community for potential sources of volunteers. Some potential volunteer sources include:

- Local elementary, middle, and high schools (both public and private)
- Local churches
- Community colleges and universities
- Companies with employer-supported volunteer programs
- Service organizations and clubs
- Youth or senior groups
- Family members of residents
- Online volunteer match sites

Once you have assessed potential sources of volunteers in your community, decide specifically where you want to start attracting volunteers from. This could be based on what volunteer jobs you have, an age-based target group, or data regarding groups that have successfully placed volunteers.

## Volunteer Coordinator

Most successful volunteer programs have a designated Volunteer Coordinator who is the main contact and support person for volunteers. In skilled nursing facilities, this is often initially the Activity Director, but another person could be designated for this role. Attracting, interviewing, and training new volunteers can and should be a group effort as long as there is a clear coordinator for planning, scheduling, and to whom volunteers can go with questions. Eventually, the Volunteer Coordinator for your facility could actually be a volunteer!

# GOALS WORKSHEET

A volunteer program in the abstract sounds like a great idea, but it cannot be successful unless it has direction. This Goals Worksheet is designed to help your facility focus on the ways in which a volunteer program can be of most use to your residents.

Use this Goals Worksheet (blank copy and examples in Appendix A) to generate ideas and discussion about your volunteer program. Ideally, these questions should be discussed with staff from every department, including a representative from your Resident Council. Get together as a team and share your responses to each of the following questions (have one team member take notes):

- Is there an element of your (non-mandated) current resident services that is incomplete or missing? Please describe.

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- Are there ways that volunteers could help fill this gap?

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- What would the facility be like if this problem was solved?

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- How would this volunteer program focus fit into your QAPI plan?

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- What are the specific tasks or jobs that you want volunteers to do?

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- How many volunteers, initially, would you like to attract?

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# GOALS WORKSHEET (CONT.)

- How often would you like volunteers for this program to participate? For how long during each visit?

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- How will you track the success of this program?

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- When will you reconvene to discuss and evaluate your volunteer program's progress?

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- Using your responses above, put into 1-2 sentences your goal for a volunteer program at your facility:

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Once you have completed this Goals Worksheet as a team, use the responses to complete a Facility Work Plan (blank copy and examples in Appendix B) to generate specific plans for attracting, planning, and retaining volunteers. An effective Facility Work Plan will include goals, procedures, tracking, and target dates for completion.

Complete an Attracting and Planning page for each goal (if you have more than one). Only one Retaining page needs to be completed.

# CREATING A VOLUNTEER HANDBOOK

A comprehensive volunteer handbook is a helpful way to inform, educate, and support your volunteers. At its core, a volunteer handbook is a document that clearly defines what a skilled nursing facility does and how volunteers can help. Spending time to train individual volunteers can be time consuming and a handbook is a helpful way to ensure that everyone starts off with the same knowledge.

A volunteer handbook is similar to an employee handbook, just without the content that would only apply to paid staff. It is your skilled nursing facility's responsibility to make sure that each volunteer receives a copy, has time to read it, and signs an acknowledgement to that effect.

The following are some ideas of what to include in your volunteer handbook:

- Welcome letter to volunteers (Appendix C)
- Mission and purpose of the skilled nursing facility
- Building map, emergency evacuation procedures and safety rules
- Expectations for conduct and behavior
- Roles, responsibilities, and rights of volunteers
- Policies and procedures surrounding absence and discontinuation of volunteer service
- Policies and procedures surrounding filing a grievance
- Staff directory including essential phone numbers and emails

Be sure to have your volunteer handbook reviewed by your human resource or legal staff as there are laws and regulations that must be observed when utilizing volunteers. As with all key documents, your volunteer handbook should be evaluated and revised on a regular basis. Current volunteers can be an excellent resource to help with this!





# VOLUNTEER MANAGEMENT SOFTWARE

Tracking and measuring your volunteer program is crucial to its success. While you can do this using an hourly log (Appendix D), volunteer management software provides an online standardized approach to volunteer tracking, reporting, measurement, and performance benchmarking. Volunteer management software can also enhance your ability to create, communicate, and fill volunteer opportunities quickly and efficiently.

Managing volunteers can be time consuming. Volunteer management software can make this task easier by automating common tasks and allowing you to communicate with your volunteers more efficiently. With volunteer management software, you can:

- Have volunteers schedule themselves and sign in for opportunities
- Track where volunteers are in the orientation process
- Create an online volunteer application to be easily accessed on your website
- Record and run reports on volunteer hours and other collected data points
- Communicate with your volunteers via email or text
- Advertise and promote upcoming training opportunities or events
- Allow all departments to create and add volunteer opportunities
- Incentivize and acknowledge volunteers through recognition

Volunteer management software is an excellent tool that can be used to develop your successful volunteer program. Making it easy to track, report, and acknowledge volunteer engagement will make life easier for you and your volunteers!



The CAHF Volunteer Engagement project utilizes the volunteer management software, Volgistics. Learn more about Volgistics at: <https://www.volgistics.com/>.

# HOW TO ATTRACT VOLUNTEERS

When looking for potential volunteers, find a contact person within the organization you are trying to reach. Although almost everyone communicates electronically these days, there is nothing like an actual conversation to convey your enthusiasm about your volunteer opportunities. If you only have email contact information initially, go ahead and send an email to your contact to see if you can set up a telephone call or in-person meeting (Appendix E).

If you do get an in-person meeting, dress professionally, be slightly early for the appointment, bring notes about your volunteer opportunities, and bring business cards or some way to provide your contact information. Be confident, shake hands, and smile! If you are enthusiastic about your volunteer opportunities, they will be too!

Describe the specific volunteer role(s) that you have available (Appendix F). Be prepared to answer questions about how many volunteers you would like, the training that will be required, and when you would like the volunteers to begin and end. This will help you both determine if there is a good fit between their volunteers and your volunteer opportunities.

Brainstorm different ways to reach the greatest number of people within their organization, which might include:

- Presenting at an organization's meeting or event
- Hosting an Open House at your skilled nursing facility and inviting the organization
- Posting notices at an organization office or events

It is always a good idea to follow up with a telephone call or an email to thank the person for their time, even if it appears they won't be able to help. If you do have a plan to move forward, repeat that plan in your telephone call or email just to make sure the plan is clear to both of you.

Meeting new people and essentially "selling" your skilled nursing facility's volunteer opportunities can be a challenge. Just like everything else, it will get easier each time you do it.

# HOW TO ATTRACT VOLUNTEERS (CONT.)

Sometimes the most important interaction with a potential volunteer happens when they first walk in the door. It is important to have a plan in place!

- Smile, be welcoming, and show enthusiasm when greeting any potential volunteer.
- Demonstrate a prepared, organized response to volunteer inquiries - people want to know they will be part of a team that is organized.
- Have the Script for Welcoming Volunteers (Appendix G) handy for the receptionist to greet any scheduled or non-scheduled potential volunteers.
- Have Volunteer Applications (Appendix H) and Welcome Letters (Appendix C) in an easily accessible file near the receptionist's desk for any staff member to access. Have a work station and computer available for a potential volunteer to complete the application upon their arrival.
- Schedule a monthly Volunteer Meet & Greet time. Most volunteers will be excited to know they are part of an important group.

The Volunteer Coordinator should respond quickly to any expression of interest from a volunteer. If there is a delay in response, apologize and explain why you didn't reply immediately. Answer all volunteer questions fully and give volunteers all the information they need to make an informed decision.

Your goal is to give volunteers the opportunity to get involved or move on if the role is not right for them. It may be best to do this in person or over the telephone rather than emailing written information so that volunteers will have the opportunity to ask questions.



# VOLUNTEER ROLE DESCRIPTIONS

An important aspect of attracting, training, and retaining volunteers is to make it clear what you want a volunteer to do. A specific description of the activities, duties, and time you expect can help you attract the right volunteer for every job. Clear expectations help your facility define and measure your volunteer goals, and help to keep communication with potential and continuing volunteers clear.

Write a Volunteer Role Description for each role you would like a volunteer to fulfill. The description may include:

## General Responsibilities:

An overall description of the role within your facility.

## Role Duties:

A specific list of duties that are expected.

## Things to Remember:

A short list of items designed to be encouraging, reminders for important facility rules, and information about where a volunteer should go with questions or to request help.

Use the examples of Volunteer Role Descriptions (Appendix F) as a guide and then personalize them for your specific facility and volunteer needs. If you post volunteer opportunities online, you can use these descriptions to attract a volunteer who is just the right fit.

# VOLUNTEER SELECTION AND SCREENING

Every year, thousands of people volunteer. Almost without exception these volunteers are eager to give of their time and effort simply because it helps others and their communities. However, just because most volunteers act altruistically doesn't mean that volunteers don't need to be screened. Good selection procedures recognize that the vast majority of volunteers deserve our best efforts to match them with a suitable role while also protecting vulnerable people.



Volunteers in skilled nursing facilities need to be screened in two ways:

## Volunteer Interview (Appendix I):

Once you have reviewed a volunteer's application, you should sit down for at least a brief interview. This is important so that you both can understand if the potential volunteer is a good match for the volunteer role(s) available. Although it takes some extra time, you should contact the references listed on the volunteer application. You should also let each prospective volunteer know that their acceptance will be subject to a background check, and that some amount of training and orientation is necessary before they begin work as a volunteer.

## Background Check:

The State Operations Manual requires that skilled nursing facility volunteers be screened along the same lines as skilled nursing facility employees. For volunteers, this will include a check for past criminal prosecution (F606). Volunteers under 18 years of age are not required to undergo a background check.

# YOUTH VOLUNTEERS

The inclusion of youth in your volunteer force can greatly energize your residents and your facility. Intergenerational programs are fun for everyone involved and they provide significantly positive experiences for youth and seniors alike.

Older adults who interact with youth can learn new innovations and technologies and feel more a part of their community. Youth who interact with seniors broaden their social and communication skills and tend to develop a much more positive attitude toward aging.

Youth volunteers can be recruited from local schools, religious, and service groups. Many youth volunteer as part of a group led by an adult during holiday times - Halloween trick-or-treating, Christmas caroling, etc. More regular youth participation can be very beneficial, however, and may be a focus of your recruiting efforts.

When recruiting youth volunteers, be aware of the nature of the roles you would like them to fill. If you are recruiting youth from an organization, be clear with the adult supervisor about your expectations regarding training, volunteer activity, and time commitment.

Potential youth volunteers should complete a Volunteer Application (Appendix H) and an interview (Appendix I). While they are not required to undergo a background check if they are under 18 years of age, they are required to have a signed Parental Consent and Release Form (Appendix K). Keep this signed form on file.



# ACCEPTING OR DECLINING A VOLUNTEER

Once you've gone through a selection and screening process, it's time to accept or decline a volunteer.

## Welcoming a Volunteer:

Saying yes to a new volunteer marks the beginning of a long and happy association. Seize the moment and welcome them with gratitude and enthusiasm. Be sure to clearly state what will happen next so that their expectations are managed.

## Saying No:

You don't have to involve every volunteer who expresses an interest in getting involved. For a variety of reasons, you just may not feel that a prospective volunteer would be a good fit for your facility's needs.

If you don't want to welcome an interested volunteer, it may be tempting just to avoid the issue and hope the volunteer loses interest. However, this approach gives a bad image of your organization and of volunteering in general. The best way forward when it comes to saying no is to let the volunteer know about your decision promptly and gently explain why. Let them know you appreciate their interest. If possible, suggest another type of organization that might be more suitable.





# VOLUNTEER TRAINING REQUIREMENTS

The State Operations Manual for skilled nursing facilities generally includes volunteers in any training that is required for paid staff (483.95). Volunteer training, however, should take place separately from staff training to make the distinction between volunteers and employees crystal clear.

Such training **must** include:

- Communication
- Residents' Rights and Facility Responsibility
- Abuse, Neglect, & Exploitation - including recognizing and reporting
- Quality Assurance and Performance Improvement
- Infection Control
- Compliance and Ethics
- Behavioral Health
- Dementia
- Accident Prevention
- Confidentiality and HIPAA Requirements
- Emergency Preparedness

Training in these areas may take the form of in-person instruction, video/computerized training, or written handouts.

Once training is completed, have each volunteer initial, sign, and date the Volunteer Acknowledgement Form (Appendix J) and keep it in your facility records.





# VOLUNTEER RECOGNITION

Retaining quality volunteers is an essential part of any successful volunteer program. Being able to communicate to your volunteers the meaning and value of their contribution to your skilled nursing facility can go a long way in developing quality volunteer retention practices.

There are numerous ways to communicate to your volunteers how much their contributions are valued:

## Communication:

- Provide feedback - Pass on thoughtful feedback about the outcomes of their efforts in the form of a quick observation. For example, "Mrs. Smith smiled the whole afternoon after you visited with her." Never underestimate the power of a hand-written thank you note!
- Keep volunteers informed - An e-newsletter or e-bulletin can be a quick and cost-effective way of keeping volunteers informed about facility developments and achievements. This will help them feel like an important part of the team.
- Encourage involvement in planning - Ask volunteers for their input, maybe via a suggestion box, so that they feel their thoughts are important and can positively impact the skilled nursing facility's community.

Volunteers give selflessly of their time, but their contribution needs to be valued. Some ideas for volunteer recognition include:

## Recognition:

- Volunteer of the month - Once a volunteer group is established, gather feedback from staff and residents about the impact of your volunteers. A Volunteer of the Month can be recognized in a facility newsletter, a picture on the wall, and/or your volunteer e-bulletin. Be specific about the number of hours they have provided and the beneficial outcome of their work.
- Annual volunteer recognition day - Organize a recurrent event to recognize volunteers, such as a lunch, dinner, or dessert reception. Gather the total number of volunteer hours, interview staff and residents about the benefits of your volunteer work force, and make your volunteers feel valued and appreciated. Hand out award certificates. Invite staff, residents, family members, members of any community group that has provided volunteers (local high school, church group, etc.), and media.

# DEALING WITH PROBLEM VOLUNTEERS

One of the easiest ways to prevent difficulties with volunteers is to attract carefully, train thoroughly, and retain quality volunteers. Also, make sure that lines of communication are wide open. Volunteers do best when both you and they know what is expected of them.

As much as we appreciate volunteers, even the best-intentioned volunteers can cause problems - either through their behavior, their reliability, or their attitude. Troublesome volunteers can really impact the effectiveness of your programs and events. While each troublesome situation is different, here are some principles to consider when trying to solve a difficult volunteer problem:

## Define the Issue:

Before you deal with a situation, you need to understand it accurately. Be sure to do this before you meet with the volunteer involved. If necessary, interview someone else familiar with the situation and take time to figure out what the problem might be. Is it:

- A character issue - Does she/he lack moral judgement or a strong work ethic?
- A life issue - Sometimes a volunteer can be suffering from acute stress or illness that affects their ability to perform.
- A competency issue - Does she/he lack the skills necessary to do the job?
- A chemistry issue - Is she/he good and competent, but just not a good fit?

Be ready to own you/your facility's part of the problem. It's almost never 100% the volunteer's problem.

## Separate the Person from the Problem:

Good volunteers, just as good people, can sometimes demonstrate bad behavior. Affirm the person, and deal with the problem. Be specific, and don't overgeneralize. For example, "you're never on time" is less preferable to "you had to cancel the last two times you were scheduled."

# DEALING WITH PROBLEM VOLUNTEERS (CONT.)

## Be Direct:

Have a conversation in person. Don't send a text message, an email, or a policy message blast that everyone knows is targeted towards one person. Begin with praise and acknowledge something positive about the person or his/her work. Deal with the issue. End with a plan and some optimism that things can change. It is a good idea at the end of such a meeting to ask the meeting to paraphrase what was said, so that you get an idea of how clearly they have understood.

## Follow Up:

Book a casual follow-up in a month. Send an encouraging note.

## Evaluate:

Evaluate the volunteer's progress. When you see positive change, let them know that you have noticed. If progress is not being made, be prepared to have another meeting. Consider reassignment, retraining, or referral to another organization.



# EMERGENCY PREPAREDNESS

The CMS Emergency Preparedness Rule set a new standard for skilled nursing facilities regarding volunteer management. In order to understand how state and/or federal volunteers can benefit your continuity of operations during a disaster, it is important to understand the different types of volunteers that the Public Health, EMS, and FEMA programs organize. These volunteers could be available to help your facility during a local large-scale emergency.

## Credentialed Volunteer:

An individual with some sort of medical or clinical qualification that is registered within the Disaster Healthcare Volunteer system.

## Affiliated Volunteer:

An individual that is attached to a recognized voluntary or nonprofit organization and is trained for specific disaster response activities. Their relationship with the organization precedes the immediate disaster. Examples include the American Red Cross or local service organizations who have disaster recovery assistance as part of their mission.

## DSW (Disaster Service Worker):

Any person registered with a disaster council or the Governor's Office of Emergency Services for the purpose of engaging in disaster service pursuant to the California Emergency Services Act without pay or other consideration.

## DHV (Disaster Healthcare Volunteer):

Any individual with medical, health, mental health, and other specialties that has been pre-registered in the DHV system. They have had their qualifications verified and are registered as DSWs. During emergencies, they are requested by and deployed to clinics and hospitals that need additional medical staff.

Unofficial volunteers can also be included in your emergency preparedness plan. Those include your existing volunteers who already provide a variety of services to your residents on a regular basis. Spontaneous, non-credentialed volunteers, those "Good Samaritans" who present themselves at a facility during disasters, can also be utilized by the facility - with the right management.

# EMERGENCY PREPAREDNESS (CONT.)

The CMS Emergency Preparedness Rule states that skilled nursing facilities must orient all volunteers on the facility's Emergency Preparedness Program and Emergency Operations Plan. This can be as simple as having a designated phone number and message for volunteers to call in and see if their assistance is needed at the facility and a plan for how they will be oriented and supervised while they are volunteering.

If you use the Nursing Home Incident Command System (NHICS), you already have a framework in place for incorporating volunteers into your emergency labor pool. Volunteers are a natural extension of your Operations branch under the NHICS system, and you will need to maintain a Volunteer Coordinator that can track their hours and monitor the safety of your volunteer workforce. For more information on the Nursing Home Incident Command System, visit: <https://www.cahfdisasterprep.com/nhics>.

Before requesting volunteers, here are a few things that your facility needs to consider:

- If needed, can you provide your volunteers with food, transportation, and lodging?
- Do the volunteers need any kind of personal protective equipment?
- Volunteers need to be appropriately oriented to the facility and the disaster situation.
- An appropriate level of supervision must be provided to volunteers at all times.
- Volunteers who are deployed must be accounted for from the initiation of assignments through demobilization (go to <https://www.cahfdisasterprep.com/> for downloadable registration and tracking forms).
- Non-credentialed volunteers should not be expected to provide direct patient care or contact.
- Disaster Healthcare Volunteers (DHV) can be requested from the County via several modes of communication (go to <https://www.cahfdisasterprep.com/> to learn more).

There are many examples of volunteers making a difference and displaying heroism during disasters at long-term care facilities. With the right management systems in place, a dedicated Volunteer Coordinator, and inclusion of volunteers during annual emergency exercises, you can strengthen your facility's Emergency Preparedness Program and protect the mission of your organization.

# REPORTING AND TRACKING VOLUNTEERISM WITH QAPI

According to the Centers for Medicare & Medicaid Services, “QAPI is the coordinated application of two mutually-reinforcing aspects of a quality management system: Quality Assurance (QA) and Performance Improvement (PI). QAPI takes a systematic, comprehensive, and data-driven approach to maintaining and improving safety and quality in nursing homes while involving all nursing home caregivers in practical and creative problem solving.

- QA is the specification of standards for quality of service and outcomes, and a process throughout the organization for assuring that care is maintained at acceptable levels in relation to those standards. QA is on-going, both anticipatory and retrospective in its efforts to identify how the organization is performing, including where and why facility performance is at risk or has failed to meet standards.
- PI (also called Quality Improvement - QI) is the continuous study and improvement of processes with the intent to better services or outcomes, and prevent or decrease the likelihood of problems, by identifying areas of opportunity and testing new approaches to fix underlying causes of persistent/systemic problems or barriers to improvement. PI in nursing homes aims to improve processes involved in health care delivery and resident quality of life. PI can make good quality even better.”

Using a QAPI approach to your volunteer program is highly recommended. While it is important to report on volunteer stories of success, it's the documentation of quality outcomes through “hard data” that will help prove the value of your volunteer program.

Identify quality measures, set measurable program goals based on internal and external benchmarks, identify opportunities for improvement, and collaborate with your interdisciplinary team on QAPI initiatives.

Use the sample QAPI Reports provided (Appendix K) to track volunteer hours, intergenerational volunteer hours, or volunteer activity hours. Stop assuming and start proving the value and success of your volunteer program!

# SUSTAINING A QUALITY VOLUNTEER PROGRAM

You have worked really hard to develop, attract, and launch a great volunteer program. Now how do you keep it going?

Sustaining your volunteer program is just as important as starting it! Here are some tips on how to sustain, grow, and develop your volunteer program.

## Recognition:

Make sure that you recognize and appreciate the volunteers you have, loudly and regularly! (See Volunteer Recognition on page 16)

## Evaluation:

Be sure to assess the success of your volunteer program on a **regular** basis. Once a month, informally check in with your volunteers, staff, and residents to ask about their satisfaction with the program. Ask if they think the volunteer program is making a positive difference.

If there is any dissatisfaction with the program, try to assess why that is:

- Volunteer dissatisfaction - Is this a scheduling issue, an interpersonal issue, a poor fit for the job, a lack of training or support? Is the volunteer clear about his/her role?
- Staff dissatisfaction - Is the volunteer program unhelpful to staff or interfering with their ability to do their job (such as a timing issue)? Does it appear to not be helping the resident(s)?
- Resident dissatisfaction - Is the resident unhappy with a specific volunteer, finding the interaction unhelpful, or unclear about the volunteer's role?

Take this assessment information seriously and meet with those involved to make changes to the existing program that will increase its success. Sometimes a minor schedule change, a conversation to clarify roles, or a small change in a volunteer task can make all the difference.

Keep track of your volunteers! Who stays and who goes, and why? Follow up to find out why some volunteers stay and why others leave.

# SUSTAINING A QUALITY VOLUNTEER PROGRAM (CONT.)

## Retention:

Most volunteers want to be busy and challenged, not bored. Recognize their contributions and ask about their continuing interest in their role. Are they happy with their job, or ready for a new challenge? Is there a job that they see other volunteers doing that they might want to try? Are they interested in mentoring a new volunteer?

## Reimagine:

It is tempting, once you have an ongoing volunteer program, to just let it continue. This does not mean, however, that your current program will continue to meet the needs of your residents, your staff, and your community.

Every six months, meet with your staff and complete a new Goals Worksheet (Appendix A) like the one that you filled out at the beginning of your volunteer program.

Also take the time to ask the following questions:

- Have the needs of your program changed?
- Have the needs of your residents changed?
- Do you need more volunteers to do the same work?
- Do you need volunteers to fill a new need in your facility?
- Has the source of your volunteers changed in their ability to provide volunteers?
- Do you need to develop a new or additional source of volunteers?

Once you have a quality volunteer program, it is much easier to change and expand it. Creating new programs and opportunities can re-energize everyone, make your program healthier, and strengthen the ties between your facility and your community.

***As always, please have your corporate/legal staff review and revise any form you have your volunteers sign, and make sure the content of the form complies with your facility's Policies & Procedures.***





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**VOLUNTEER ENGAGEMENT  
PROJECT**

*\*Many of the sample forms in the following appendices can be created and managed through volunteer management software.*

# GOALS WORKSHEET

- Is there an element of your (non-mandated) current resident services that is incomplete or missing? Please describe.

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- Are there ways that volunteers could help fill this gap?

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- What would the facility be like if this problem was solved?

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- How would this volunteer program focus fit into your QAPI plan?

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- What are the specific tasks or jobs that you want volunteers to do?

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- How many volunteers, initially, would you like to recruit?

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- How often would you like volunteers for this program to participate? For how long during each visit?

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- How will you track the success of this program?

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- When will you reconvene to discuss and evaluate your volunteer program's progress?

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# GOALS WORKSHEET (CONT.)

- Using your responses above, put into 1-2 sentences your goal for a volunteer program at your facility:

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# GOALS WORKSHEET: EXAMPLE #1

- Is there an element of your (non-mandated) current resident services that is incomplete or missing? Please describe.

We have residents at our facility who don't have visitors or who tend to stay in their rooms. They seem lonely and isolated.

- Are there ways that volunteers could help fill this gap?

We could get volunteers to agree to visit one of these residents on a regular basis.

- What would the facility be like if this problem was solved?

Residents would feel less lonely, more connected, and have something to look forward to. It would also be nice to have community members come to the facility on a regular basis.

- How would this volunteer program focus fit into your QAPI plan? (for staff only)

Our QAPI goals include increasing resident-centered programs. Volunteer visitors who visit the same resident on a regular basis would be able to help meet that individual resident's needs.

- What are the specific tasks or jobs that you want volunteers to do?

We would like our volunteers to visit specified residents on an individual basis to provide companionship, individual attention, socialization, and 1:1 activity. Volunteers may sign up to work with either one or two residents.

- How many volunteers, initially, would you like to recruit?

We initially want to recruit 5 volunteers to begin these services, and expand that number as needed.

- How often would you like volunteers for this program to participate? For how long during each visit?

We would like each volunteer to come on a weekly basis for one hour per resident. We would ask that each volunteer commit to provide services for 6 months, which can be extended.

# GOALS WORKSHEET: EXAMPLE #1 (CONT.)

- How will you track the success of this program?

We will track the number of hours each volunteer participates per month and the number of hours of our volunteers as a whole per month. We will ask volunteers, staff, and residents at least once per month about the impact of the volunteer program.

- When will you reconvene to discuss and evaluate your volunteer program's progress?

We will meet again in six months to discuss and evaluate our progress.

- Using your responses above, put into 1-2 sentences your goal for a volunteer program at your facility:

A volunteer program that provided individual volunteers for residents who are isolated or lonely would greatly improve resident quality of life and the general well-being of our facility.

# GOALS WORKSHEET: EXAMPLE #2

- Is there an element of your (non-mandated) current resident services that is incomplete or missing? Please describe.

There is currently no official celebration of resident birthdays. It would be nice to celebrate resident birthdays on a monthly basis so that they feel recognized and proud of their age.

- Are there ways that volunteers could help fill this gap?

We could recruit a volunteer group to plan and lead a resident birthday celebration once a month.

- What would the facility be like if this problem was solved?

Residents would feel that their birthdays and ages are still worthy of celebration. Staff could be aware of resident birthdays and more likely to offer their congratulations.

- How would this volunteer program focus fit into your QAPI plan? (for staff only)

Our QAPI goals include increasing resident-centered programs. A monthly birthday party would help residents feel remembered and celebrated at the facility and in the community.

- What are the specific tasks or jobs that you want volunteers to do?

We would like our volunteers to plan, organize, and carry out a monthly resident birthday party. This will include obtaining a list of resident birthdays by month, coordinate a day and time with the activity director, contact the dietary department regarding refreshments, and make or provide birthday cards for each birthday resident. The volunteer group would be responsible for set-up and clean up.

- How many volunteers, initially, would you like to recruit?

We initially want to recruit a group of four volunteers to begin these services. This number could be expanded or decreased depending upon need.

## GOALS WORKSHEET: EXAMPLE #2 (CONT.)

- How often would you like volunteers for this program to participate? For how long during each visit?

We would like the volunteer group to come once per month on a specified day and time for the party. This would probably require two hours per event, including set up and clean up. We would ask that each volunteer commit to provide services for six months, which can be extended.

- How will you track the success of this program?

We will track the number of hours each volunteer participates per month and the number of hours of our volunteers as a whole per month.

We will ask volunteers, staff, and residents at least once per month following the birthday party about the impact of the volunteer program.

- When will you reconvene to discuss and evaluate your volunteer program's progress?

We will meet again in six months to discuss and evaluate our progress.

- Using your responses above, put into 1-2 sentences your goal for a volunteer program at your facility:

A volunteer program that provided monthly resident birthday parties would greatly improve resident quality of life and the general well-being of our facility. Celebrations would be fun and bring people closer together.

# FACILITY WORK PLAN

Date: \_\_\_\_\_

Facility Name: \_\_\_\_\_

Overall Goal(s): \_\_\_\_\_

	What needs to be done to accomplish our goal?	Who needs to be involved inside and outside the organization?	Who will ensure recruiting goals are completed?	What specific steps need to be taken?	Who will monitor progress? How will we monitor progress?	When do we want these goals completed?
Attracting	We need to attract ____ new volunteers	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Director of Nursing <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Social Services <input type="checkbox"/> Activity Staff <input type="checkbox"/> Dietary <input type="checkbox"/> Community church <input type="checkbox"/> Community school <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Director of Nursing <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Social Services <input type="checkbox"/> Activity Staff <input type="checkbox"/> Dietary <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director to contact at least one:  <input type="checkbox"/> Church <input type="checkbox"/> School <input type="checkbox"/> Other: _____ <input type="checkbox"/> Administrator to print flyers <input type="checkbox"/> Other: _____ <input type="checkbox"/> Interdisciplinary team to distribute flyers <input type="checkbox"/> Other: _____	<input type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Weekly report to team <input type="checkbox"/> Other: _____ <input type="checkbox"/> Administrator to report weekly to team <input type="checkbox"/> Other: _____ <input type="checkbox"/> Report at weekly interdisciplinary team meeting <input type="checkbox"/> Other: _____	____ days Date: Actual Date Completed:
		<input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	____ days Date: Actual Date Completed:
		<input type="checkbox"/> Other: _____	<input type="checkbox"/> Other: _____	<input type="checkbox"/> Other: _____	<input type="checkbox"/> Other: _____	____ days Date: Actual Date Completed:



Planning	What needs to be done to accomplish our goals?	Who needs to be involved inside and outside the organization?	Who will ensure planning goals are completed?	What specific steps need to be taken?	Who will monitor progress? How will we monitor progress?	When do we want these goals completed?
	Role descriptions	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Activity Staff <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Write job description specific to volunteer job  <input type="checkbox"/> Other: _____  <input type="checkbox"/> Other: _____	<input type="checkbox"/> Weekly report to Administrator  <input type="checkbox"/> Other: _____  <input type="checkbox"/> Other: _____	____ days  Date:  Actual Date Completed:
	Interviews	<input type="checkbox"/> Activity Director <input type="checkbox"/> Activity Staff <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Gather applications <input type="checkbox"/> Set up interviews <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Weekly report to Administrator  <input type="checkbox"/> Other: _____  <input type="checkbox"/> Other: _____	____ days  Date:  Actual Date Completed:
	Volgistics (volunteer management software) set-up	<input type="checkbox"/> Activity Director <input type="checkbox"/> Activity Staff <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Activity Staff <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Enter volunteer information into Volgistics  <input type="checkbox"/> Set up volunteer schedule  <input type="checkbox"/> Other: _____	<input type="checkbox"/> Weekly report to Administrator  <input type="checkbox"/> Other: _____  <input type="checkbox"/> Other: _____	____ days  Date:  Actual Date Completed:
	Volunteer training	<input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Activity Director <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Schedule volunteer training dates  <input type="checkbox"/> Other: _____  <input type="checkbox"/> Other: _____	<input type="checkbox"/> Weekly report to Administrator  <input type="checkbox"/> Other: _____  <input type="checkbox"/> Other: _____	____ days  Date:  Actual Date Completed:

	What needs to be done to accomplish our goals?	Who needs to be involved inside and outside the organization?	Who will ensure our retaining goals are completed?	What specific steps need to be taken?	Who will monitor progress? How will we monitor progress?	When do we want these retaining goals completed?
Retaining	Plan a volunteer recognition event(s)	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Director of Nursing <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Social Services <input type="checkbox"/> Activity Staff <input type="checkbox"/> Dietary <input type="checkbox"/> Community church <input type="checkbox"/> Community school <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Interdisciplinary team <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Get interdisciplinary team input and support for event for National Volunteer Week event in April <input type="checkbox"/> Other: _____	<input type="checkbox"/> Interdisciplinary team weekly check-in <input type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____	____ days Date: Actual Date Completed:
				<input type="checkbox"/> Have residents make invitations, thank-you cards, decorations <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Other: _____	____ days Date: Actual Date Completed:
	Develop a monthly volunteer recognition event	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Director of Nursing <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Social Services <input type="checkbox"/> Activity Staff <input type="checkbox"/> Dietary <input type="checkbox"/> Community church <input type="checkbox"/> Community school <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Interdisciplinary team <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> As a team, pick and plan 3 volunteer recognition events <input type="checkbox"/> Other: _____	<input type="checkbox"/> Interdisciplinary team weekly check-in <input type="checkbox"/> Other: _____	____ days Date: Actual Date Completed:
				<input type="checkbox"/> Have residents make invitations, thank-you cards, decorations <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Other: _____	____ days Date: Actual Date Completed:

# FACILITY WORK PLAN: EXAMPLE #1

Date: 3/6/19

Facility Name: California Skilled Nursing Facility

Overall Goal(s): Add 10 hours of 1:1 interaction with residents weekly

	What needs to be done to accomplish our goal?	Who needs to be involved inside and outside the organization?	Who will ensure recruiting goals are completed?	What specific steps need to be taken?	Who will monitor progress? How will we monitor progress?	When do we want these goals completed?
<b>Attracting</b>	We need to attract <u>5</u> new volunteers	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Director of Nursing <input type="checkbox"/> Director of Staff Development <input checked="" type="checkbox"/> Social Services <input checked="" type="checkbox"/> Activity Staff <input type="checkbox"/> Dietary <input checked="" type="checkbox"/> Community church <input checked="" type="checkbox"/> Community school <input checked="" type="checkbox"/> Other: <u>Residents</u>	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Director of Nursing <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Social Services <input type="checkbox"/> Activity Staff <input type="checkbox"/> Dietary <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Activity Director to contact at least one: <input checked="" type="checkbox"/> Church <input checked="" type="checkbox"/> School <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Weekly report to Administrator <input checked="" type="checkbox"/> Weekly report to team <input type="checkbox"/> Other:	<u>30</u> days Date: 4/6/19 Actual Date Completed:
		<input type="checkbox"/> Other:	<input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Administrator to print flyers <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Administrator to report weekly to team <input type="checkbox"/> Other:	<u>30</u> days Date: 4/6/19 Actual Date Completed:
		<input type="checkbox"/> Other:	<input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Interdisciplinary team to distribute flyers <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Report at weekly interdisciplinary team meeting <input type="checkbox"/> Other:	<u>45</u> days Date: 4/21/19 Actual Date Completed:

Planning	What needs to be done to accomplish our goals?	Who needs to be involved inside and outside the organization?	Who will ensure planning goals are completed?	What specific steps need to be taken?	Who will monitor progress? How will we monitor progress?	When do we want these goals completed?
	Role descriptions	<input checked="" type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input checked="" type="checkbox"/> Activity Staff <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Write job description specific to volunteer job <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<u>30</u> days Date: 4/6/19 Actual Date Completed:
	Interviews	<input checked="" type="checkbox"/> Activity Director <input type="checkbox"/> Activity Staff <input checked="" type="checkbox"/> Other: <u>Social Services</u> <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Gather applications <input checked="" type="checkbox"/> Set up interviews <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<u>90</u> days Date: 6/6/19 Actual Date Completed:
	Volgistics (volunteer management software) set-up	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Activity Staff <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Activity Director <input type="checkbox"/> Activity Staff <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Enter volunteer information into Volgistics <input checked="" type="checkbox"/> Set up volunteer schedule <input checked="" type="checkbox"/> Other: <u>interview residents</u>	<input checked="" type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<u>30</u> days Date: 4/6/19 Actual Date Completed:
	Volunteer training	<input checked="" type="checkbox"/> Director of Staff Development <input checked="" type="checkbox"/> Activity Director <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Schedule volunteer training dates <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<u>90</u> days Date: 6/6/19 Actual Date Completed:

	What needs to be done to accomplish our goal?	Who needs to be involved inside and outside the organization?	Who will ensure our retaining goals are completed?	What specific steps need to be taken?	Who will monitor progress? How will we monitor progress?	When do we want these retaining goals completed?
Retaining	Plan a volunteer recognition event(s)	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Director of Nursing <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Social Services <input type="checkbox"/> Activity Staff <input type="checkbox"/> Dietary <input type="checkbox"/> Community church <input type="checkbox"/> Community school <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Interdisciplinary team <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Get interdisciplinary team input and support for event during National Volunteer Week in April <input type="checkbox"/> Other: _____	<input type="checkbox"/> Interdisciplinary team weekly check-in <input type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____	____ days Date: Actual Date Completed:
				<input type="checkbox"/> Have residents make invitations, thank-you cards, decorations <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Other: _____	____ days Date: Actual Date Completed:
	Develop a monthly volunteer recognition event	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input checked="" type="checkbox"/> Director of Nursing <input checked="" type="checkbox"/> Director of Staff Development <input checked="" type="checkbox"/> Social Services <input checked="" type="checkbox"/> Activity Staff <input checked="" type="checkbox"/> Dietary <input type="checkbox"/> Community church <input type="checkbox"/> Community school <input checked="" type="checkbox"/> Other: <u>Residents</u> <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Interdisciplinary team <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> As a team, pick and plan 3 volunteer recognition events <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Interdisciplinary team weekly check-in <input type="checkbox"/> Other: _____	<u>90</u> days Date: 6/6/19 Actual Date Completed:
				<input checked="" type="checkbox"/> Have residents make invitations, thank-you cards, decorations <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Activity Director <input type="checkbox"/> Other: _____	<u>75</u> days Date: 5/22/19 Actual Date Completed:

# FACILITY WORK PLAN: EXAMPLE #2

Date: 9/1/19

Facility Name: California Skilled Nursing Facility

Overall Goal(s): Develop a Facility Greeter Program utilizing volunteers 7 days per week

Attracting	What needs to be done to accomplish our goal?	Who needs to be involved inside and outside the organization?	Who will ensure recruiting goals are completed?	What specific steps need to be taken?	Who will monitor progress? How will we monitor progress?	When do we want these goals completed?
	We need to attract <u>7</u> new volunteers	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Director of Nursing <input type="checkbox"/> Director of Staff Development <input checked="" type="checkbox"/> Social Services <input checked="" type="checkbox"/> Activity Staff <input type="checkbox"/> Dietary <input checked="" type="checkbox"/> Community church <input checked="" type="checkbox"/> Community school <input checked="" type="checkbox"/> Other: <u>Resident family members</u> <input type="checkbox"/> Other:  <input type="checkbox"/> Other:  <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Director of Nursing <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Social Services <input type="checkbox"/> Activity Staff <input type="checkbox"/> Dietary <input type="checkbox"/> Other:  <input type="checkbox"/> Other:  <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Activity Director to contact at least one: <input checked="" type="checkbox"/> Church <input checked="" type="checkbox"/> School <input type="checkbox"/> Other: <u>resident family members</u>	<input checked="" type="checkbox"/> Weekly report to Administrator <input checked="" type="checkbox"/> Weekly report to team <input type="checkbox"/> Other:  <input type="checkbox"/> Other:	<u>30</u> days Date: 9/1/19 Actual Date Completed:
		<input type="checkbox"/> Other:  <input type="checkbox"/> Other:	<input type="checkbox"/> Other:  <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Administrator to print flyers <input type="checkbox"/> Other:  <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Administrator to report weekly to team <input type="checkbox"/> Other:  <input type="checkbox"/> Other:	<u>30</u> days Date: 9/1/19 Actual Date Completed:
		<input type="checkbox"/> Other:	<input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Interdisciplinary team to distribute flyers <input type="checkbox"/> Other:  <input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Report at weekly interdisciplinary team meeting <input type="checkbox"/> Other:  <input type="checkbox"/> Other:	<u>45</u> days Date: 9/15/19 Actual Date Completed:

Planning	What needs to be done to accomplish our goals?	Who needs to be involved inside and outside the organization?	Who will ensure planning goals are completed?	What specific steps need to be taken?	Who will monitor progress? How will we monitor progress?	When do we want these goals completed?
	Role descriptions	<input checked="" type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input checked="" type="checkbox"/> Activity Staff <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Write job description specific to volunteer job <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<u>30</u> days Date: 9/1/19 Actual Date Completed:
	Interviews	<input checked="" type="checkbox"/> Activity Director <input type="checkbox"/> Activity Staff <input checked="" type="checkbox"/> Other: <u>Social Services</u> <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Gather applications <input checked="" type="checkbox"/> Set up interviews <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<u>90</u> days Date: 11/1/19 Actual Date Completed:
	Volgistics (volunteer management software) set-up	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Activity Staff <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Activity Director <input type="checkbox"/> Activity Staff <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Enter volunteer information into Volgistics <input checked="" type="checkbox"/> Set up volunteer schedule <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<u>30</u> days Date: 9/1/19 Actual Date Completed:
	Volunteer training	<input checked="" type="checkbox"/> Director of Staff Development <input checked="" type="checkbox"/> Activity Director <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Schedule volunteer training dates <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<u>90</u> days Date: 11/1/19 Actual Date Completed:

	What needs to be done to accomplish our goal?	Who needs to be involved inside and outside the organization?	Who will ensure our retaining goals are completed?	What specific steps need to be taken?	Who will monitor progress? How will we monitor progress?	When do we want these retaining goals completed?
Retaining	Plan a volunteer recognition event(s)	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input checked="" type="checkbox"/> Director of Nursing <input checked="" type="checkbox"/> Director of Staff Development <input checked="" type="checkbox"/> Social Services <input checked="" type="checkbox"/> Activity Staff <input checked="" type="checkbox"/> Dietary <input type="checkbox"/> Community church <input type="checkbox"/> Community school <input checked="" type="checkbox"/> Other: <u>Residents</u> <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Administrator <input type="checkbox"/> Interdisciplinary team <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input checked="" type="checkbox"/> Get interdisciplinary team input and support for event during National Volunteer Week in April  <input checked="" type="checkbox"/> Other: <u>holiday event</u>	<input checked="" type="checkbox"/> Interdisciplinary team weekly check-in  <input checked="" type="checkbox"/> Weekly report to Administrator <input type="checkbox"/> Other: _____	<u>90</u> days Date: 11/1/19  Actual Date Completed:
				<input checked="" type="checkbox"/> Have residents make invitations, thank-you cards, decorations  <input checked="" type="checkbox"/> Other: <u>crafts</u>	<input checked="" type="checkbox"/> Activity Director <input checked="" type="checkbox"/> Other: <u>activity staff</u>	<u>90</u> days Date: 11/1/19  Actual Date Completed:
	Develop a monthly volunteer recognition event	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Director of Nursing <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Social Services <input type="checkbox"/> Activity Staff <input type="checkbox"/> Dietary <input type="checkbox"/> Community church <input type="checkbox"/> Community school <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Interdisciplinary team <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____	<input type="checkbox"/> As a team, pick and plan 3 volunteer recognition events  <input type="checkbox"/> Other: _____	<input type="checkbox"/> Interdisciplinary team weekly check-in  <input type="checkbox"/> Other: _____	____ days Date:  Actual Date Completed:
				<input type="checkbox"/> Have residents make invitations, thank-you cards, decorations  <input type="checkbox"/> Other: _____	<input type="checkbox"/> Activity Director <input type="checkbox"/> Other: _____	____ days Date:  Actual Date Completed:





# WELCOME LETTER TO VOLUNTEERS

Welcome and thank you for your interest in volunteering at \_\_\_\_\_. Our resident community is greatly enhanced by the work of our volunteers.

\_\_\_\_\_ offers various opportunities for volunteers. Before completing an application it is important that you understand some important information about becoming a volunteer with us. **Our volunteers perform roles that are humanitarian in nature without pay or the expectation of future employment.**

**Application:** You will be asked to complete a written application that includes personal information and this information will be verified. You will need to give us permission to make inquiries of others concerning your suitability as a volunteer.

**Criminal Background Check:** All volunteers who work in skilled nursing facilities must agree to a criminal background check. This is for the safety of our residents and is required of all paid staff as well. \*Volunteers under the age of 18 not required. Please provide parental permission signature.

**Facility Rules & Regulations:** Our nursing facility expects all volunteers to uphold standards of behavior as set forth in our facility rules and regulations. Please read the document that will be provided to you and make sure you are willing and able to abide by it.

**Orientation & Training:** All volunteers must participate in a mandatory orientation and training program. This will be scheduled prior to your assignment as a volunteer and will involve approximately 2-3 hours of your time. Such training will include: Resident Rights, Elder Abuse & Neglect, Infection Control, Dementia, Accident Prevention, Confidentiality, and Emergency Preparedness.

**Confidentiality:** In the course of volunteering, you may be dealing with confidential information about others. You must abide by the confidentiality regulations you receive in your training and be willing to keep such information in the strictest confidence.

**Health Concerns:** You may find yourself working in an environment of contagious disease and you must be willing to protect yourself and others with appropriate precautions and procedures.

**Termination:** The relationship between \_\_\_\_\_ and its volunteers is an “at will” arrangement and may be terminated at any time without cause by either the volunteer or the facility.

**Image Release:** We will ask you to be willing to give \_\_\_\_\_ permission to use your likeness, voice and/or words in television, radio, film, or in any form to promote activities at our facility.

**Volunteer Service:** The volunteer service that you will provide is voluntary in nature and will not be compensated. Also, volunteering is no guarantee of employment, nor does being a volunteer give you preference.

If you have any questions about any of this information, please feel free to ask the Volunteer Coordinator. If you are ready to take on this wonderful responsibility, your next step is to complete the Volunteer Application.



# SCRIPT FOR RECRUITING VOLUNTEERS

## Email Contact:

“Hello! I am \_\_\_\_\_ from \_\_\_\_\_, and I received your contact information from \_\_\_\_\_ (*the internet, a website, the organization’s receptionist, etc.*). I am writing today to see if we could set up a time to talk about some of the great volunteer opportunities we have. Please let me know when would be a convenient time for us to talk. I can be reached at this email, or at \_\_\_\_\_ (*phone number*) between the hours of \_\_\_\_\_ (*your work hours*).

Thank you very much for your time. I look forward to hearing from you.”

## Telephone Contact:

“Hello! I am \_\_\_\_\_ from \_\_\_\_\_. Thank you so much for taking my call. I understand you may have volunteers that might be interested in helping out in the community. We at \_\_\_\_\_ have some volunteer opportunities that I would love to tell you about. (*Briefly describe the specific volunteer task(s) for which you are recruiting*).

Does this sound like something your volunteers could help us with? (*Per response*), Great! What is the best way for me to talk to some of your potential volunteers about the opportunities we have available? (*Presentation at an event, post notices at their office or event, face-to-face meeting with their volunteer coordinator, etc.*).

Thank you very much for your time today. I am pleased to hear your organization might be able to provide some volunteers to help make a difference. I look forward to meeting them at (*wherever or whatever you have agreed upon during the conversation*). If you have any further questions, please feel free to call or email me at any time.”

Face to face Contact:

“Hello! I am \_\_\_\_\_ from \_\_\_\_\_. Thank you so much for taking the time to meet with me today. I am excited to share with you some volunteer opportunities at my skilled nursing facility and am hoping your volunteers might be a good fit. *(Briefly describe the specific volunteer task(s) for which you are recruiting).*

Does this sound like something your volunteers could help us with? *(Per response),* Great! What is the best way for me to talk to some of your potential volunteers about the opportunities we have available? *(Presentation at an event, post notices at their office or event, face-to-face meeting with their volunteer coordinator, etc.).*

Thank you very much for your time today. I am pleased to hear your organization might be able to provide some volunteers to help make a difference. I look forward to meeting them at *(wherever or whatever you have agreed upon during the conversation).* If you have any further questions, please feel free to call or email me at any time.”

# VOLUNTEER ROLE DESCRIPTION #1

## Individual Resident Interaction

General Responsibilities: Volunteer will provide quality individual interaction with a resident that appreciates his/her needs and interests.

### Job Duties:

- 1) Gather information from staff about the resident's interests, likes, history, etc. If he/she is not attending facility activities, find out why.
- 2) Introduce yourself to the resident. Share information about yourself and get to know him/her.
- 3) Plan a regular, weekly time for a one-hour visit that works for both of your schedules.
- 4) Use information from the resident, the staff, and written handouts for ideas about how to spend time with the resident. Feel free to bring in items (such as pictures, magazines, playing cards, etc.) from home to facilitate some discussion or activity.
- 5) As you get to know the resident, please share your thoughts and insights with the Activity Director.

### Things to Remember:

- There are plenty of resources for ideas, so don't worry about having to come up with ideas all on your own. Try a number of discussion topics and activities!
- Your interaction with the resident may be personal and meaningful. Do not share resident information with anyone outside of the facility.
- If you want to plan a food or movement-related activity, please check with nursing staff first regarding any restrictions.
- For some residents, your interaction may be the only outside contact that they have. Please honor your commitment by being prompt and regular in your visits.
- Anytime you have questions or concerns about your volunteer role, please do not hesitate to ask! The Activity Staff and Administrator are here to support you and to help make your volunteer experience rewarding for everyone.

# VOLUNTEER ROLE DESCRIPTION #2

## Greeter

General Responsibilities: Volunteer will act as a Greeter to welcome visitors to our facility.

### Job Duties:

- 1) As a Volunteer Greeter, you will be positioned near the building entrance to welcome all visitors to our facility. Greeters will be enthusiastic, welcoming, and smile.
- 2) Volunteer Greeters are asked to sign up for a two-hour shift.
- 3) Ask all visitors to sign the Visitor Book near the entrance and to put on a nametag. Greeters will also ask all visitors to sign out when they leave the facility.
- 4) Volunteer Greeters will be available to answer general questions, such as directions within the facility, procedures for signing in and out, activity schedule, etc. Any questions about specific residents or facility procedures will be politely directed to appropriate staff by the Greeter. All Greeters will be trained in how to answer these questions.
- 5) As you observe visitors and answer questions over the course of your volunteer experience, please share your thoughts and insights with the Activity Director.

### Things to Remember:

- As a Volunteer Greeter, you will naturally observe residents and visitors. Do not share any resident information with anyone outside the facility.
- Visitors and residents will depend upon your presence at our facility. Please honor your commitment by being prompt and dependable.
- Anytime you have questions or concerns about your volunteer role, please do not hesitate to ask! The Activity Staff and Administrator are here to support you and to help make your volunteer experience rewarding for everyone.



# VOLUNTEER ROLE DESCRIPTION #3

## Group Activity - (specify activity here)

General Responsibilities: Volunteer will lead or assist with quality resident group interaction as specified and discussed with the Activity Staff.

### Job Duties:

- 1) Discuss specific needs for a volunteer group activity with the Activity Staff. *(Examples of such activities may include Bingo, a Sports Night, or a specific interest discussion group. Be specific about the activity in this job description.)*
- 2) Plan a regular weekly, biweekly, or monthly time for the group activity that works with your schedule and the facility.
- 3) With staff assistance, identify residents who would be interested in this group activity.
- 4) Introduce yourself to these residents and provide a brief, enthusiastic description of the group activity. Make a short flyer or card with the description of the group activity and the meeting time and place to leave with each resident.
- 5) Come prepared to lead or assist the Activity Staff leader. This may include set-up, assisting residents to and from the activity, and clean-up, as needed.
- 6) As you get to know the residents, please share your thoughts and insights with the Activity Director.

### Things to Remember:

- Your interaction with residents may be personal and meaningful. Do not share resident information with anyone outside the facility.
- Residents will look forward to this activity and your presence. Please honor your commitment by being prompt and dependable.
- Anytime you have questions or concerns about your volunteer role, please do not hesitate to ask! The Activity Staff and Administrator are here to support you and to help make your volunteer experience rewarding for everyone.

# VOLUNTEER ROLE DESCRIPTION #3

## Volunteer Coordinator

General Responsibilities: Volunteer will organize, recruit, schedule, and maintain all volunteer participation in our facility. The Volunteer Coordinator will also work with staff to plan strategies and events to retain quality volunteers.

### Job Duties:

- 1) Responsible for organizing volunteer positions within the facility, based on input from the facility Administrator and Activity Director. Includes writing Volunteer Role Descriptions for each volunteer position with time commitments for each.
- 2) Recruit, as necessary, to fill the Volunteer Role Descriptions. Volunteers may be recruited from a number of community agencies (schools, churches, and service groups), family members of current or past residents, businesses neighboring the facility, etc.
- 3) Facilitate the process needed to help applicants become volunteers. All interested persons must complete an application, be interviewed by facility staff, and undergo volunteer orientation and training per facility policies and procedures in order to become a volunteer. Work with the Administrator, Activity Director, Director of Staff Development, and other staff to coordinate this process.
- 4) Input volunteer information into the facility's online volunteer management software, if applicable.
- 5) Responsible for maintaining the volunteer schedule to enable volunteers to sign up for shifts. Will ensure that volunteer opportunities are posted on a regular basis and will recruit for any unfilled shifts.
- 6) Maintain, track, and report all volunteer participation. Print out monthly reports as requested by the Activity Director or Administrator (may include number of volunteer hours, volunteer participation based on activity type, volunteer age, etc.)
- 7) Meet monthly with facility staff to report on volunteer participation, and to discuss any challenges regarding organization, recruiting, and scheduling.

## VOLUNTEER ROLE DESCRIPTION #3 (CONT.)

- 8) Work with Administrator, Activity Director, and other staff to develop strategies and plan events to recognize and retain quality volunteers (may include Volunteer of the month program, Volunteer Appreciation events, thank-you notes from residents, etc.)

### Things to Remember:

- This is a very important role, but don't be overwhelmed! Many of the job duties listed are addressed in the [\*How to Create a Robust Volunteer Program in Your Skilled Nursing Facility\*](#) handbook. Please use it as a reference and a guide. If the facility has volunteer management software, it will make scheduling and reporting a breeze - use it to your advantage.
- As a Volunteer Coordinator, you will naturally observe residents. Do not share any resident information with anyone outside the facility.
- Facility volunteers and residents will depend upon your presence. Please honor your commitment by being organized and dependable.
- Anytime you have questions or concerns about your volunteer role, please do not hesitate to ask! The Activity Staff and Administrator are here to support you and to help make your volunteer experience rewarding for everyone.

# SCRIPT FOR WELCOMING VOLUNTEERS

“Welcome to \_\_\_\_\_. We are very happy to have you here today and are excited about your interest in volunteering. I am \_\_\_\_\_ and I work here as the \_\_\_\_\_. Our Volunteer Coordinator is \_\_\_\_\_. Do you have an appointment with her/him today?”

**(Yes)** Great! I will let her/him know that you are here.

**(No)** That’s ok. I will give you a welcome letter, her/his business card so that you can reach her/him, and have you complete a volunteer application.

Please make yourself comfortable as you read the letter and complete the application, and let me know if you have any questions before you go. Thank you very much for coming in and I hope you are able to join us in the work we do!”

# VOLUNTEER APPLICATION FORM

Name (first, middle, last):
Nickname:
Birthdate:
Address:
Home phone:
Cell phone:
Email:
Preferred method of contact (home phone, cell phone, email):

Please indicate why you want to volunteer:

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List any prior experience in volunteer work:

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List any special interests or hobbies:

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Do you belong to any clubs or organizations? If so, list and describe your involvement:

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How long do you plan to volunteer?

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List any languages that you speak:

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Are you currently employed?  Yes  No

If yes, what type of work do you do?

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How did you hear about volunteer opportunities here?

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### EMERGENCY CONTACT

Please list at least one person to be called in case of an emergency.

Name	Relationship to you	Phone number

### REFERENCES

Please list three people who know you well and can attest to your character, skills, and dependability.

Name	Relationship to you	Length of relationship	Phone number

***Please read the following carefully before initialing and signing:***

I understand that this is an application for and not a commitment or promise of volunteer opportunity. I certify that I have and will provide information throughout the selection process, including on this application for a volunteer position and in interviews that is true, correct and complete to the best of my knowledge. I certify that I have and will answer all questions to the best of my ability and that I have not and will not withhold any information that would unfavorably affect my application for a volunteer position. I understand that information contained on my application will be verified. I understand that misrepresentations or omissions may be cause for my immediate rejection as an applicant for a volunteer position or my termination as a volunteer.

\_\_\_\_\_ I certify that all the information provided in this Volunteer Application is true and complete. I agree to have the statements checked. I understand that any false information or omissions may disqualify me from further consideration and may result in dismissal if discovered at a later date.

\_\_\_\_\_ I am aware that a more detailed investigation concerning my background may also be conducted. I hereby authorize that investigation. I also understand that my volunteer status is contingent upon satisfactory completion of reference checks.

\_\_\_\_\_ I understand that I will be given an orientation and necessary training related to my duties once I begin my service as a volunteer.

\_\_\_\_\_ I understand that the volunteer service I will provide is voluntary in nature and will not be compensated.

\_\_\_\_\_ I understand that volunteering is no guarantee of employment, nor does being a volunteer give me preference.

***I have read and understand, and by my signature, consent to these statements.***

Signature \_\_\_\_\_

Date \_\_\_\_\_

## Volunteer Preferences

Please indicate your availability:  Daily  Weekly  Monthly

Days you prefer to volunteer:  Monday  Tuesday  Wednesday  Thursday  Friday

Saturday  Sunday

What time are you available: \_\_\_\_:\_\_\_\_  am  pm to \_\_\_\_:\_\_\_\_  am  pm

What date are you available to begin volunteer service: \_\_\_\_\_

Other scheduling considerations:

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Do you prefer to work with:  Individual residents  Group activities

*Please indicate preferred activities by checking the corresponding boxes:*

Individual Activities	Group Programs
<input type="checkbox"/> Reading books/magazines	<input type="checkbox"/> Exercises
<input type="checkbox"/> Writing/reading letters	<input type="checkbox"/> Baking/cooking
<input type="checkbox"/> Shopping	<input type="checkbox"/> Movies
<input type="checkbox"/> Passing mail	<input type="checkbox"/> Gardening
<input type="checkbox"/> Painting fingernails	<input type="checkbox"/> Crafts
<input type="checkbox"/> Assisting residents to and from activities	<input type="checkbox"/> Current events
<input type="checkbox"/> Recruiting other volunteers	<input type="checkbox"/> Sports
<input type="checkbox"/> Interviewing for life histories	<input type="checkbox"/> Assisting on outing
<input type="checkbox"/> One-on-one games	<input type="checkbox"/> Special events
<input type="checkbox"/> Scrapbooking	<input type="checkbox"/> Weekend activities
<b>Miscellaneous</b>	<input type="checkbox"/> Sing along/music
<input type="checkbox"/> Sewing	<input type="checkbox"/> Serving refreshments
<input type="checkbox"/> Decorating	<input type="checkbox"/> Night activities
<input type="checkbox"/> Putting up calendars	<input type="checkbox"/> Parties
<input type="checkbox"/> Assisting with planning events	<input type="checkbox"/> Bingo/table games
<input type="checkbox"/> Designing posters/flyers	<input type="checkbox"/> Men's group
<input type="checkbox"/> Putting up posters in the community	<input type="checkbox"/> Women's group
<input type="checkbox"/> Assisting with newsletters	<input type="checkbox"/> Church/religious
<input type="checkbox"/> Talking to groups	<input type="checkbox"/> Other:



# VOLUNTEER INTERVIEW FORM

Name of Volunteer:

Date:

Why are you interested in this role, and what do you hope to get out of volunteering?

What skills and experience do you have that you could bring to this role?

Have you volunteered before?

What have you enjoyed most about your previous volunteer or work experience?

Was there anything you didn't enjoy about your previous volunteering or work experience?

Are there any tasks you would not like to do as a volunteer?

Are there any additional needs or practical requirements that you need to carry out the role?

# VOLUNTEER ACKNOWLEDGEMENT FORM

\_\_\_\_\_ I have received training on and understand the Communication Policies and Procedures

\_\_\_\_\_ I have received training on and understand the Residents' Rights and Facility Responsibility Policies and Procedures

\_\_\_\_\_ I have received training on and understand the Abuse, Neglect, and Exploitation Policies and Procedures

\_\_\_\_\_ I have received training on and understand the Quality Assurance and Performance Improvement Policies and Procedures

\_\_\_\_\_ I have received training on and understand the Infection Control Policies and Procedures

\_\_\_\_\_ I have received training on and understand the Compliance and Ethics Policies and Procedures

\_\_\_\_\_ I have received training on and understand the Behavioral Health Policies and Procedures

\_\_\_\_\_ I have received training on and understand the Dementia Policies and Procedures

\_\_\_\_\_ I have received training on and understand the Accident Prevention Policies and Procedures

\_\_\_\_\_ I have received training on and understand the Confidentiality and HIPAA Requirements Policy and Procedures

\_\_\_\_\_ I have received training on and understand the Emergency Preparedness Policies and Procedures

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Volunteer Signature

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Date

# YOUTH VOLUNTEER PARENTAL CONSENT AND RELEASE FORM

I, \_\_\_\_\_, being the parent or legal guardian of \_\_\_\_\_ (the Minor), hereby consent to and authorize him/her to act as a volunteer at \_\_\_\_\_ (facility name). I acknowledge and agree that activities performed by the Minor as a volunteer will be performed strictly on a voluntary basis, without any pay, compensation, or benefits. I agree and understand that the Minor must comply with the rules and regulations established by the skilled nursing facility and that failure to do so may result in the Minor's immediate removal as a volunteer.

I am aware of the nature of the activities to be performed by the Minor as a volunteer, and recognize that in performing volunteer tasks, a risk of harm or injury exists. I agree that all volunteer activities are to be performed by the Minor at his/her own risk and I assume full responsibility therefore.

On behalf of myself, the Minor, and our respective heirs and personal representatives, I agree to indemnify and not to hold \_\_\_\_\_ (facility name), their population served, volunteers, or staff responsible for any injury or damage sustained or incurred by the Minor, arising out of or in any way connected with the Minor's activities as a volunteer. I hereby release and discharge \_\_\_\_\_ (facility name), their employees, and their volunteers from any and all claims, demands, causes of action of any nature or cause, for any such injury or damage incurred or suffered by the Minor.

\_\_\_\_\_  
Signature of Parent/Legal Guardian

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name of Parent/Legal Guardian

\_\_\_\_\_  
Parent/Guardian email

\_\_\_\_\_  
Parent/Guardian telephone number for emergencies

## QAPI REPORT #1

Volunteer Engagement - Volunteer Hours	Current Month	Prior Month	Past Prior Month
Sunday			
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
<b>Monthly Totals</b>			

**Instructions:** Enter total volunteer hours by day over the month. Look for trends in total monthly hours and significant variations in the days month over month.

**Root Cause Analysis/Discussion** (identify trends and discuss causes/intervention actions):

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**Action plan:**

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## QAPI REPORT #2

Volunteer Engagement - Intergenerational Volunteer Hours	Current Month	Prior Month	Past Prior Month
Weekdays - Age up to 18			
Weekdays - Ages 19-39 (young adult)			
Weekdays - Ages 40-64 (adult)			
Weekdays - over 65 (senior)			
Weekends - Age up to 18			
Weekends - Ages 19-39 (young adult)			
Weekends - Ages 40-64 (adult)			
Weekends - over 65 (senior)			
<b>Total Hours - Youth</b>			
<b>Total Hours - Adult</b>			
<b>Total Hours - Senior</b>			

**Instructions:** Enter total volunteer hours on weekdays and weekends represented by each age group over the month. Look for trends in total monthly hours and significant variations in the volunteer hours of each category month over month.

**Root Cause Analysis/Discussion** (identify trends and discuss causes/intervention actions):

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**Action plan:**

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## QAPI REPORT #3

Volunteer Engagement - Volunteer Activity Hours	Current Month	Prior Month	Past Prior Month
Birthday Party			
BINGO			
1:1 Visit			
Cooking			
Animal			
Arts			
Book Club			
<b>Monthly Totals</b>			

**Instructions:** Enter total volunteer hours by activity over the month. Look for trends in monthly totals of hours and as well as variations in the activity hours month over month.

**Root Cause Analysis/Discussion** (identify trends and discuss causes/intervention actions):

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**Action plan:**

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## QAPI REPORT #4

Volunteer Engagement - Volunteer Recruitment Efforts	Current Month	Prior Month	Past Prior Month
Number of Flyers. Include flyers distributed, posted, or maintained in public areas.			
Outreach efforts to community organizations (e.g. local churches, schools, clubs) that may have volunteers. List # of calls / emails / visits.			
Posts to online volunteering boards (e.g. VolunteerMatch.org, AllforGood.org). Include new posts or any active posts online.			
Announcements made to staff or current volunteers about need for additional volunteers.			
Community events attended			
Other (describe):			
<b>Monthly Totals</b>			

**Instructions:** Enter volunteer recruitment efforts in each area over the month. Look for trends in total recruitment efforts and variations in the different recruitment types month over month.

**Root Cause Analysis/Discussion** (identify trends and discuss causes/intervention actions):

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**Action plan:**

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# CONSENT TO PHOTOGRAPH AND AUTHORIZATION FOR USE OR DISCLOSURE

Volunteer Name: \_\_\_\_\_

I hereby consent to being photographed while volunteering at \_\_\_\_\_. The term “photograph” includes video or still photography, in digital or any other format and any other means of recording or reproducing images. I hereby authorize the use of the photographs by, or disclosure of the photographs to \_\_\_\_\_.

Purpose:

I hereby authorize the use or disclosure of the photographs in order to assist educational, public relations, marketing, news media, and charitable goals, and I hereby waive any right to compensation for such uses.

Expiration:

This authorization expires: \_\_\_\_\_. Upon expiration of this authorization, \_\_\_\_\_ will not permit further release of any photograph, but will not be able to call back any photographs or information already released.

\_\_\_\_\_  
Volunteer Signature

\_\_\_\_\_  
Date



# FLYER #1

## Reasons to volunteer at \_\_\_\_\_:

Develop new skills

Expand your horizons

Connect with your community

Make the world a better place

Renew a sense of purpose

Meet new people with life experience

Make intergenerational relationships

Have fun

We have opportunities for you to become a special friend to someone who needs you. Volunteer a little, or a lot!

We will support you every step of the way.

**We LOVE our volunteers!**

**For more information about volunteering with us,  
contact \_\_\_\_\_ at \_\_\_\_\_.**

## FLYER #2

## Reasons to volunteer at \_\_\_\_\_ :

- Develop new skills
- Expand your horizons
- Connect with your community
- Make the world a better place
- Renew a sense of purpose
- Meet new people with life experience
- Make intergenerational relationships
- Have fun

We have multiple opportunities for volunteers!  
 Give a lot of time, or just a little.  
 Volunteer for a group activity, or be a special friend to  
 someone who needs you.

**We LOVE our volunteers!**

For more information about volunteering with us,  
 contact \_\_\_\_\_ at  
 \_\_\_\_\_.

## FLYER #3

# VOLUNTEER

at \_\_\_\_\_

Develop new skills

Expand your horizons

Connect with your  
community

Renew a sense of  
purpose

Meet new people with  
life experience

Make intergenerational  
relationships

Have fun

Make the world a  
better place



We have multiple opportunities for volunteers! Give a lot of time, or just a little.

Volunteer for a group activity, or be a special friend to someone who needs you.

We LOVE our volunteers!

For more information about volunteering with us, contact \_\_\_\_\_ at \_\_\_\_\_.

# CONFIDENTIALITY & HEALTH INSURANCE PORTABILITY AND ACCOUNTABILITY ACT

## HIPAA and Confidentiality of Protected Health Information

\_\_\_\_\_ respects the personal privacy of its clients (clients being defined as people residing here, recipients of our services, and our employees) and understands the sensitive nature of its clients' health information. We also recognize that federal and state laws require that individually identifiable health information must be safeguarded against improper use or disclosure. It is our policy not to use or disclose a client's health information except as permitted by law and to adopt safeguards to protect the confidentiality of its clients' health information.

We appreciate your enthusiasm about your volunteer work and note the desire to share your experiences here with your family and friends on social media; however, we will ask that you NOT post pictures of residents, staff, or events on social media sites without expressed written permission from the Volunteer Coordinator, residents, and staff.

As a volunteer, you have received specific training about confidentiality and HIPAA laws. Please keep this training in mind every time you talk about your volunteer experience at our facility.

Thank you!

# THINGS TO DO WHILE VISITING AN OLDER ADULT

1. Talk about what you both have been up to since your last visit together
2. Share photos of family and friends, from long ago or more recently
3. Create a photo album, framed photograph collection, or poster to hang up
4. Make a special scrapbook celebrating the older adult's lifetime
5. Write or tape the older adult's memoirs or autobiography
6. Share your own favorite stories or memories
7. Bring vacation photos, souvenirs, maps, and stories of your travels
8. Read aloud from newspapers and magazines to help him/her stay in touch
9. Look at magazines with large, colorful pictures together
10. Google the older adult's hometown news to share
11. Read inspirational articles, magazines, or poems
12. Read emails from your family and friends
13. Help the older adult write letters to send out
14. Find a pen pal and help the older adult correspond
15. Create a poster or mobile from magazine pictures
16. Bring items relating to the current season or upcoming holiday to discuss
17. Visit at lunchtime and bring your lunch - eat together inside or outside
18. Enjoy a cup of a favorite beverage that you bring along (with RN approval)
19. Bring a musical instrument you play for a private concert
20. Teach the older adult to play a musical instrument
21. Sing, hum, or whistle together
22. Find an age-appropriate play list and play "name that tune"
23. Listen to music together
24. Play charades
25. Wind or ball yarn for a knitting project either of you is working on
26. Work on a craft project together
27. Do an art project together - even if it is new to both of you
28. Make simple gifts for the older adult's grandchildren
29. Bring along your sewing basket or button box to organize together
30. Build a bird feeder to hang outside the older adult's window
31. Bring along a bird book and see how many you can identify
32. Bring out the mending while you visit - yours or theirs
33. Brush, comb, or style the older adult's hair
34. Paint her nails
35. Ask for help in planning your garden and bring seed/flower catalogs
36. Plant or take care of a planter together
37. Create a terrarium together the requires little maintenance
38. Play word, guessing, and trivia games

39. Play card, table, or board games
40. Do crossword puzzles together
41. Do jigsaw puzzles - small ones you can finish or large ones over time
42. Watch television together and discuss the shows
43. Download an old favorite movie or musical to share together
44. Go window shopping in fancy catalogs just for fun
45. Bring along a favorite or new recipe to discuss or plan a meal
46. Bring items to stimulate the sense of smell - spices, perfume, etc.
47. Bring in different textured fabrics to touch - silk, wool, denim, velvet
48. Bring items or artwork your children or grandchildren have made at school
49. Start a collection or hobby you both enjoy
50. Find others who share that collection or hobby and invite them to visit
51. Read a new chapter of a novel each time you visit
52. Write poetry or a short story together
53. Look at and listen to an old-fashioned music box
54. Make a "joy box" by decorating and filling a shoe box with favorite items
55. Watch the seasons change outside the window
56. Take pictures of the changing seasons and keep a picture diary
57. Keep a mutual journal of the interesting things you've done together
58. Make potpourri together and display in the room
59. Tell jokes - bring along a joke book
60. Cut out his/her favorite comic strip on Sunday to share at your next visit
61. Bring along an old friend of the older adult for a special reunion
62. Take a picture of him/her to share with family, and ask for photos in return (with their permission)
63. Take a walk or wheel outside, sit on the porch or patio (with RN permission)
64. Bring your children or grandchildren for a visit
65. Make scarves, mittens, or toys to donate
66. Celebrate the holidays with special parties for two
67. Keep track of a favorite sports team
68. Learn a new word each time you get together
69. Challenge the older adult to a spelling bee
70. Play along with a television game show
71. Dance, clap, or tap your feet to the older adult's favorite song
72. Bring a travel book or brochure to dream about a fantasy vacation
73. Use small rhythm instruments or kazoos to make your own music
74. Read the Farmer's Almanac and see which predictions come true
75. Play tic-tac-toe or hangman
76. Ask the older adult to share memories of community changes over the years
77. Make a list of the older adult's favorites - movies, music, teachers, celebrities- to put up in the room
78. Talk about what you would both do if you had one million dollars
79. Design and make your own holiday cards to send
80. Toss cards into a hat, pitch pennies, play marbles
81. Sit and hold the older adult's hand and be a good listener

82. Try to draw each other's portraits
83. Recite nursery rhymes and children's songs from each of your childhoods
84. Work on a latch hook rug for her/his room while you visit
85. Watch your favorite YouTube videos with the older adult
86. Find YouTube videos she/he would like and watch together
87. Play solitaire together
88. Bring modeling clay or play-doh and try sculpting something together
89. Invite the older adult to dictate a letter to a soldier that you can write and mail through a non-profit organization like Soldier's Angels or Operation Gratitude
90. Discuss your favorite family traditions with each other
91. Facilitate a phone call or video chat with the older adult and their loved ones
92. Ask the older adult about their career or their education
93. Talk about a close friend of yours and invite the older adult to speak about close friends that they have had in their lifetime. Bring an associated item hold and talk about at your next visit.
94. Learn chair dancing techniques together
95. Review the words that have been added to Webster's dictionary in recent years
96. Make necklaces with large beads and string
97. Play road trip games in the room, like I-spy and the alphabet game
98. Bring in different types of flowers or fauna from nearby. Work together to identify and learn about these different plants (being careful not to bring in pests or allergens)
99. Bring in handheld video game devices to play with the older adults
100. Learn a new language together



# 8 LONG-TERM HEALTH BENEFITS OF VOLUNTEERING

*By Claire Shinn, Sponsored by [Reward Volunteers](#)*

The impact of volunteerism can be felt in communities of all shapes and sizes. No matter the size of the community, though, the impact of volunteerism is always huge.

Wherever it occurs, volunteering exists to help others. But volunteerism's best-kept secret is this: it's good for you, too. We did some digging to find out all the reasons why volunteering rocks.

- 1. Boosts self-esteem** - Volunteering helps build a strong safety net for when you're experiencing trying times. With those strong social ties, you're always surrounded by a community that's willing to help you out when times get tough. When you volunteer, you become a part of someone else's safety net, too. By helping others, you'll build a greater sense of trust and self-esteem.
- 2. Expands your connections** - The relationships you can create while volunteering are endless. You connect to others through volunteering, and if you do it regularly, you can maintain those valuable social networks into the future. You can make new friends and keep the old by engaging in a common activity like volunteering. With a larger social network, you'll have more resources at your fingertips, which leads to better physical, mental and emotional health.
- 3. Makes you feel good** - If you've ever volunteered before, you've probably experienced this: volunteering makes you happy! Researchers at the London School of Economics found that people become happier by volunteering more. When you give your time to others, you attain a personal sense of accomplishment, which accounts for some of the positive effects that volunteering has on your mood. There's a threshold to reaping the full benefits of volunteering, though. In order to soak up all the positive effects of community service, you need to set aside some time for it. Volunteers who commit at least one or two hours every week reap the fullest benefits from their service.
- 4. Contributes to a longer life** - Volunteering does more than boost your mood – it also has effects on your physical well-being. Volunteers encounter greater longevity and less frequency of heart disease. Volunteers may be at a lower risk for memory loss, too. The social interaction can significantly reduce the progress of Alzheimer's and other types of dementia. Happier and healthier life? Count me in.
- 5. Gives purpose** - As people get older, they experience a higher risk for isolation. Volunteering combats that statistic by adding a sense of purpose to your life. The same goes for people with Obsessive-Compulsive Disorder, Post-Traumatic Stress Disorder and other mental illnesses. No matter who you are, there are plenty of ways to give your life new meaning by helping others.



**6. Combats stress** - Volunteering goes beyond just being something fun to do; it decreases stress, too. Studies on the “Happiness Effect” of volunteering show that you become happier the more you volunteer. When you assist others, your body releases dopamine in the brain, which has a positive effect on how you feel. Volunteers also experience lower levels of depression.

**7. Gives a good example** - Volunteering as a family is a great way to teach important lessons to your children. Kids are always learning from the example you set for them, so make sure it's a good one! You can show the impact of volunteering through your actions. By giving back to the community, you can lay the foundation for service in the years to come.

Volunteering doesn't just have to inspire kids, either! You can share your experiences through programs like Reward Volunteers, which lets you connect with other volunteers, find new opportunities and win prizes for your community service. Through sharing your service, you can inspire others. Bringing smiles to other volunteers will bring one to you, too.

**8. Teaches new skills** - Live a little! Volunteering gives you the opportunity to explore new skills and interests that you might not get to enjoy otherwise. You can broaden your horizons while helping others at the same time. If you're looking to change things up a little, you can also try out a new job or role without having to commit to something long-term. Volunteering gives you the inside scoop on how some organizations operate, and it can hook you up with some helpful references if you're serious about making a job switch.

From improving your physical well-being to boosting your mindset, volunteering does a world of good. Most times, you can see the impact of giving your time right off the bat. With all the health perks associated with volunteering, there's really no reason why you shouldn't give it a shot. By helping improve your community, you're also helping yourself. It's a win-win! Once you get in the swing of things, you'll be a happy and healthy volunteer in no time.