

# WORK PLAN



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

**Instructions:** Define an overall goal for your volunteer program. You should have a conversation with your entire interdisciplinary team regarding the needs of your residents and areas where volunteers could offer support. Then compose an overall goal that addresses these needs / areas through volunteerism. It is recommended that your overall goal be S.M.A.R.T., meaning it is Specific, Measurable, Attainable, Relevant, and Time-bound. *Example: Create a resident book club that meets once per week for one hour and is led by at least two alternating volunteers.\**

**Overall Goal(s):**

**How to use these tables:** The overall goal identifies an improvement to be made. To accomplish this goal, you will complete three phases: attracting, planning, and retaining. Each phase includes one or more objectives. Objectives are the steps you take within each phase in service of the overall goal. Then, the objectives are broken down further into tasks. Tasks will be completed along the way to meeting the objective. As you fill out the table for each phase, track your objectives from left to right on the table and answer the questions in each column along the way. The worksheet is intended to help you understand the components of your overall goal and the process to achieving it.

	How will you <b>recruit</b> volunteers to meet your overall goal(s)? Define one objective	Who needs to be involved inside and outside the organization to accomplish this objective?	Who will ensure this objective is completed?	List 2 specific tasks for each person/group to accomplish in order to meet the recruitment objective.	Who will monitor progress on these tasks? How will progress be monitored?	When do we want these tasks completed?
Attracting Phase	<p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>- Attract <u>4</u> new volunteers.</li> <li>- Engage current volunteers to serve <u>8</u> more hours per <u>month</u>.</li> </ul>	<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"/> _____ <input type="checkbox"/> _____	<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"/> _____ <input type="checkbox"/> _____	<u>Activity Director</u> <input type="checkbox"/> _____  <input type="checkbox"/> _____	<u>Activity Director</u> <input type="checkbox"/> Weekly report to Administrator  <input type="checkbox"/> Weekly report to team <input type="checkbox"/> Other: _____	_____ days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: _____ Actual Date Completed: _____
				<u>Administrator</u> <input type="checkbox"/> _____  <input type="checkbox"/> _____	<u>Administrator</u> <input type="checkbox"/> Weekly report to team <input type="checkbox"/> Other: _____	_____ days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: _____ Actual Date Completed: _____
				<u>Interdisciplinary team</u> <input type="checkbox"/> _____  <input type="checkbox"/> _____	<u>Interdisciplinary Team</u> <input type="checkbox"/> Report at weekly IDT meeting <input type="checkbox"/> Other: _____	_____ days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: _____ Actual Date Completed: _____

\* Please see Volunteer Engagement Project Handbook Appendix B for more examples of completed work plans.

# Planning Phase

How do you <u>plan</u> to accomplish your overall goal(s)? List four objectives that you want to include in your plan.	Who needs to be involved inside and outside the organization?	Who will ensure planning objectives are completed?	List two specific tasks for each objective in the planning phase.	Who will monitor progress? How will we monitor progress? <i>Example: Weekly report to Administrator or IDT at stand up</i>	When do we want these tasks completed?
<p><i>Example: Start using volunteer role descriptions</i></p>	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Activity Staff <input type="checkbox"/> Other: <input type="text"/> <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/> <p><i>Example: create role descriptions; or, print the templates from the handbook; place print outs at front desk</i></p>	Progress monitor person: <input type="text"/> How to monitor progress? <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="text"/> days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: <input type="text"/> Actual Date Completed: <input type="text"/>
<p><i>Example: Conduct volunteer Interviews</i></p>	<input type="checkbox"/> Activity Director <input type="checkbox"/> Activity Staff <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/> <p><i>Example: review volunteer applications; schedule interviews; call candidates</i></p>	Progress monitor person: <input type="text"/> How to monitor progress? <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="text"/> days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: <input type="text"/> Actual Date Completed: <input type="text"/>
<p><i>Example: Set up volunteer management software</i></p>	<input type="checkbox"/> Activity Director <input type="checkbox"/> Activity Staff <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> Activity Director <input type="checkbox"/> Activity Staff <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/> <p><i>Example: input volunteer info into software; set up volunteer schedule in software; print schedule and post where all volunteers can view it</i></p>	Progress monitor person: <input type="text"/> How to monitor progress? <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="text"/> days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: <input type="text"/> Actual Date Completed: <input type="text"/>
<p><i>Example: Conduct volunteer training or orientation</i></p>	<input type="checkbox"/> Director of Staff Development <input type="checkbox"/> Activity Director <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Director of Staff Development <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/> <p><i>Example: schedule a training session for new volunteers share details with applicants; re-train existing volunteers</i></p>	Progress monitor person: <input type="text"/> How to monitor progress? <input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>	<input type="text"/> days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: <input type="text"/> Actual Date Completed: <input type="text"/>

# Retaining Phase

What are two things you can do to <u>retain</u> volunteers, which will help you accomplish your goal(s)?	Who needs to be involved inside and outside the organization?	Who will ensure our retaining goals are completed?	List three specific tasks to be completed this part of the retaining phase. Check the box when the task is completed.	Who will monitor progress of this specific task? How will progress be monitored? <i>Example: weekly check-in email to Dietary and IDT about event</i>	When do we want this task completed?
<p><i>Example: Plan a volunteer recognition event to honor National Volunteer Month</i></p>	<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 organization(s): <input type="text"/> <input type="checkbox"/> Other: <input type="text"/>	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Interdisciplinary team <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>  <p><i>Example: Plan a volunteer appreciation event during Volunteer Week in April.</i></p>	Progress monitor person: <input type="text"/> How to monitor progress? <input type="text"/> <input type="text"/>	<input type="text"/> days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: <input type="text"/> Completed: <input type="text"/>
			<input type="checkbox"/> <input type="text"/>  <p><i>Example: Ask residents to make thank you cards for volunteers.</i></p>	Progress monitor person: <input type="text"/> How to monitor progress? <input type="text"/> <input type="text"/>	<input type="text"/> days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: <input type="text"/> Completed: <input type="text"/>
			<input type="checkbox"/> <input type="text"/> <input type="checkbox"/> <input type="text"/>  <p><i>Example: Request for ideas and support from Dietary dept. and entire interdisciplinary team.</i></p>	Progress monitor person: <input type="text"/> How to monitor progress? <input type="text"/> <input type="text"/>	<input type="text"/> days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: <input type="text"/> Completed: <input type="text"/>
<p><i>Example: Develop a monthly Volunteer Recognition Event</i></p>	<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 organization(s): <input type="text"/> <input type="text"/> <input type="checkbox"/> Other: <input type="text"/> <input type="checkbox"/> Other: <input type="text"/>	<input type="checkbox"/> Activity Director <input type="checkbox"/> Administrator <input type="checkbox"/> Interdisciplinary team <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>  <p><i>Example: Determine where to hold the monthly event and how staff will support</i></p>	Progress monitor person: <input type="text"/> How to monitor progress? <input type="text"/> <input type="text"/>	<input type="text"/> days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: <input type="text"/> Completed: <input type="text"/>
			<input type="checkbox"/> <input type="text"/>  <p><i>Example: Ask residents to make invitations and decorations for events.</i></p>	Progress monitor person: <input type="text"/> How to monitor progress? <input type="text"/> <input type="text"/>	<input type="text"/> days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: <input type="text"/> Completed: <input type="text"/>
			<input type="checkbox"/> <input type="text"/>  <p><i>Example: Request for ideas and support from Dietary dept. and entire interdisciplinary team.</i></p>	Progress monitor person: <input type="text"/> How to monitor progress? <input type="text"/> <input type="text"/>	<input type="text"/> days <i>or</i> <input type="checkbox"/> ongoing <i>or</i> Date: <input type="text"/> Completed: <input type="text"/>