### A. Plan for Strategic Healthcare Volunteer Engagement

1. Assess organizational needs and opportunities for volunteers  
2. Promote organizational readiness (e.g., commitment, capacity, competency)  
3. Research and analyze related programs and services  
4. Develop goals and objectives for volunteer services  
5. Develop policies and procedures for volunteer services  
6. Develop supporting tools and resources for volunteer services (e.g., forms, databases)  
7. Develop evaluation plan for volunteer services  
8. Develop risk management or safety plan for volunteer services  
9. Establish benchmarks for volunteer services  
10. Implement evaluation plan for volunteer services

### B. Advocate for Healthcare Volunteer Involvement

11. Design communication plan for volunteer services  
12. Implement communication plan for volunteer services  
13. Evaluate communication plan for volunteer services  
14. Inform community/customers of volunteer service opportunities  
15. Enlist community/customers in promoting volunteer service opportunities  
16. Develop volunteers as internal and external advocates  
17. Advocate for volunteer services (to internal and external customers and community)  
18. Cultivate community/customer and partner relationships  
19. Collaborate with customers

### C. Attract and Onboard a Healthcare Volunteer Workforce

20. Identify current needs for volunteers  
21. Develop volunteer position descriptions  
22. Develop performance objectives for volunteer roles  
23. Design recruitment strategy for volunteers  
24. Implement recruitment strategy for volunteers  
25. Respond to volunteer inquiries  
26. Select applicants for interviews  
27. Conduct applicant interviews  
28. Administer screening process  
29. Match volunteers with assignments  
30. Evaluate placement of volunteers  
31. Evaluate recruitment strategies

### D. Prepare Healthcare Volunteers for their Roles

32. Develop onboarding protocol for volunteers  
33. Design orientation for volunteers  
34. Conduct orientation for volunteers  
35. Coordinate role-specific training  
36. Support on-going development of volunteers’ skills
### E. Document Healthcare Volunteer Involvement

37. Evaluate volunteer orientation  
38. Evaluate volunteer training  
39. Obtain permission to release volunteer information or photos  
40. Establish secure storage for volunteer records  
41. Create volunteer files  
42. Maintain volunteer records (e.g. hours, activities, personal information)  
43. Update external screening processes (e.g. background checks)  
44. Generate statistical reports on volunteer services  
45. Archive, destroy, or delete volunteer records  
46. Contribute to budget process  
47. Monitor resources that support volunteer engagement (financial, physical, human)  
48. Provide information to support funding requests  
49. Maintain records on partnership and stakeholder contacts and relationships  
50. Maintain partnership agreements  

### F. Manage Healthcare Volunteer Performance and Impact

51. Train staff to work with volunteers  
52. Monitor progress on volunteer performance objectives  
53. Delegate tasks to volunteers  
54. Supervise volunteers  
55. Coach volunteers  
56. Conduct volunteer performance reviews  
57. Provide feedback to volunteers  
58. Conduct corrective action procedures  
59. Gather feedback from volunteers (e.g. surveys, exit interviews)  

### G. Acknowledge, Celebrate and Sustain Healthcare Volunteer Involvement

60. Develop volunteer recognition plan  
61. Implement volunteer recognition plan  
62. Evaluate volunteer recognition plan  
63. Provide references for volunteers  
64. Assess volunteer satisfaction  
65. Develop retention plan  
66. Monitor retention plan  
67. Evaluate retention plan
### Enabling Knowledge and Skills in Healthcare Volunteer Management

Competent performance of the tasks listed above requires a wide variety of knowledge and skills, including:

<table>
<thead>
<tr>
<th>Knowledge Of:</th>
<th>Ability To:</th>
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<tbody>
<tr>
<td>Auxiliary management</td>
<td>Analyze data</td>
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<td>Budget analysis</td>
<td>Analyze work to delegate tasks</td>
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<tr>
<td>Change management</td>
<td>Build relationships</td>
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<tr>
<td>Collaboration principles</td>
<td>Convey enthusiasm for volunteerism</td>
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<tr>
<td>Communication principles</td>
<td>Create data driven reports</td>
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<td>Community needs</td>
<td>Develop written communications</td>
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<td>Ethics</td>
<td>Ensure an inclusive work environment</td>
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<td>Evaluation</td>
<td>Facilitate training activities</td>
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<tr>
<td>Fundraising</td>
<td>Motivate others</td>
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<td>Goal and objective setting</td>
<td>Present to groups</td>
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<tr>
<td>Human resource laws</td>
<td>Resolve conflict</td>
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<tr>
<td>Marketing</td>
<td>Share stories to illustrate a point</td>
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<tr>
<td>Needs assessment</td>
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<td>Partnership development</td>
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<td>Policies and procedure development</td>
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<td>Project management</td>
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<td>Public relations</td>
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<td>Record keeping</td>
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<td>Recruitment principles</td>
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<td>Research methods</td>
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<td>Retail operations</td>
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<tr>
<td>Risk Management</td>
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<tr>
<td>Screening volunteers</td>
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<tr>
<td>Strategic planning</td>
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<tr>
<td>Training design</td>
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<tr>
<td>Volunteer motivations</td>
<td></td>
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