Principles of Volunteer Resource Management
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ABOUT YOUR AHVRP SPEAKER

Victoria Heidelman, CAVS

Director of Volunteers

St. Joseph Hospital

Orange, California

Victoria has been in the field of volunteer management for almost thirty years. She began her own volunteer journey with federal inmates at Lompoc Federal Penitentiary in the early 70s. After graduating from the University of California, Santa Barbara she started working in a county juvenile hall facility, county home for abused and abandoned children, group homes, and a private school for troubled youth until she happily stumbled upon the world of volunteer management.

Currently, Victoria oversees 900 volunteers in a Catholic hospital. Her current focus is reducing the turnover rate in her hospital by designing a “high impact” service, Volunteer Resource Coordinators, inspired by discussions with fellow Principles Trainer Margie Harris. Victoria considers herself fortunate to have an extraordinary group of leadership volunteers with whom she and her team of staff can strategize on improvements to their volunteer program.

Victoria is a former President of the Southern California Association of Directors of Volunteer Services, past chair of the California Association of Hospitals and Health Systems’ Directors Coordinating Council and state conference, and co-chair of the 2008 AHVRP Conference. She currently serves as one of five national trainers for the AHVRP Principles of Volunteer Management Course.

In 1997 Victoria was the recipient of her Southern California DVS Association’s Professional Achievement Award for National Education; this was in recognition for the Joint Commission Education series she co-presented nationally through the California Hospital Association in the mid-90’s. Victoria has received CAVS certification through AHVRP.
PRINCIPLES COURSE MODULE DESCRIPTIONS

Principles of Volunteer Resource Management Module 1:

Volunteer Resources Strategic Planning and Program Enhancement

Competing for resources? Striving to achieve a higher level of “program credibility”? What’s it going to take? Adapting traditional volunteer programs to what has become a new era in healthcare and a new generation of volunteers is critical to positioning your program for the future. Hear about current healthcare trends impacting your program and integrated program models designed to support these trends. This session will also cover the DVS’s role with advocacy, emergency and disaster preparedness, and strategic alignment of goals. Achieving staff buy-in, and those all important outcome measures to market the “value” of your volunteer program will be reviewed. Thriving, not just surviving, in today’s healthcare environment is a key focus of this session. Be the “visionary” leader it will take to move your program to the next level…and enjoy the success you will find!

Principles of Volunteer Resource Management Module 2:

Legal Awareness for Volunteer Administrators

Anyone can sue anyone for anything at any time. Are you familiar with the laws that directly pertain to volunteer management? This session will help keep your hospital out of court and out of the news. The program provides an overview of current laws with implications for volunteers and volunteer services administrators. Participants will learn and discuss Labor and Screening Laws (Fair Labor Standards Act and Child Labor Law, use of volunteers during a work stoppage, and the Volunteers for Children Act of 1996), Privacy Law (HIPAA), Anti-Discriminatory (Americans with Disabilities Act and Amendment, Title VII of the Civil Rights Act, EMTALA), Liability Coverage Law: Federal Volunteer Protection Act of 1997, Tax Laws (Internal Revenue Service, Guidelines for Scholarship Programs, and For-Profit versus Non-Profit Fundraising/Advocacy), state-level Community Benefit Act to protect 501 and Safety Laws (OSHA).
PRINCIPLES COURSE MODULE DESCRIPTIONS
(Continued)

Principles of Volunteer Resource Management Module 3:

Ongoing Preparedness for Joint Commission

Are you prepared for your next Joint Commission Survey? Do you know the current National Patient Safety Goals for healthcare? Come review the past, present, and future standards to understand practical options for complying with Joint Commission expectations now. This interactive program includes current information, best practices, and provides great resources to strengthen volunteer services programs! With unannounced surveys, tracer methodology, new numbering systems and reorganized standards, the Joint Commission has streamlined the process to assess and insure quality patient care and safe environments. The Joint Commission recognizes the importance and impact that volunteers can have in direct patient contact areas. The program explains how volunteers are interpreted in the standards, so you can focus on the standards that pertain to your program and people. This session will help teach you specific strategies how to stay in constant readiness for the Joint Commission. Ultimately, you are responsible for insuring that your volunteers provide safe, high-quality, effective services. This program is designed to give you the tools you need to maximize positive outcomes!

Principles of Volunteer Resource Management Module 4:

Proactive Program Management, Assessment, and Design

Does your program have the “WOW’ factor? Do you have the right services, for the right departments, at the right time? Where can you have the greatest impact? How do you get staff buy-in to service these areas? What is the best training technique to get staff to take ownership of their assigned volunteers? How do high impact services play into recruitment? Get the answers to these and other key questions in this power-packed 90-minute session that covers: ongoing program assessment, developing “high impact” services, building a staff training program that truly works, having clearly defined policies and procedures in place to aid staff in managing their volunteer workforce, and designing recruitment strategies for a new generation of volunteers. This is a program you won’t want to miss!
Principles of Volunteer Resource Management Module 5:

Program Operations and Risk Management

In today’s challenging economy, the bottom line for volunteer management professionals is to manage effective and cost-efficient volunteer programs. This session discusses best practice recommendations for the foundation of a successful volunteer program that meets the needs of hospitals and our next generation volunteers. Current standards mandate that safety, security and risk management be woven throughout the entire volunteer program.

This program will provide an overview of the crucial fundamentals including interviewing, screening, training, recognition, and retention of volunteers. What can you say and ask during an interview? What does Joint Commission expect for you to cover during orientation? What do volunteers “really” want regarding personal recognition? How can you keep your volunteers active and involved? This is just the tip of the iceberg of what is covered in this program. In addition to the content, you will receive time-proven sample forms that you can use at your facility. Program Operations and Risk Management is a “must-have” session!

Principles of Volunteer Resource Management Module 6:

Technology, Tools, and Professional Development

What are some of the latest and greatest technology tools to assist Volunteer leaders in the daily operation and management of their volunteer programs? How important is Continuous Quality Improvement (CQI) in securing the future of your volunteer program? What resources are available to assist in your own professional development as a volunteer administrator? This interactive session will provide the answers to these and other questions as you look at some best practice tools and discuss topics such as CQI, records management, budget planning, fundraising, integrating technology into program components, public relations, networking, and viable resources for your own professional development.

Even if you are not a “techie” you will have a better understanding of what technology is available in volunteer administration and why it may be well worth the time to learn how to use it. This session reviews what processes will help you to better manage your overall program!
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Module 4:  
Proactive Program Management, Assessment, and Design

Content Overview

Does your program have the “WOW” factor? Do you have the right services, for the right departments, at the right time? Where can you have the greatest impact? How do you get staff buy-in to service these areas? What is the best training technique to get staff to take ownership of their assigned volunteers? How do high impact services play into recruitment? Get the answers to these and other key questions in this power-packed 90-minute session that covers: ongoing program assessment, developing “high impact” services, building a staff training program that truly works, having clearly defined policies and procedures in place to aid staff in managing their volunteer workforce, and designing recruitment strategies for a new generation of volunteers. This is a program you won’t want to miss!

Learning Objectives

During this educational program, participants will learn and discuss:

- Time management and the art of delegating
- Impact of policies and procedures
- Three components to on-going program assessment
- Key steps to take when designing “high impact” services
- “How to's” for building an effective staff training program
- Need for innovative recruitment strategies geared to a new generation of volunteers
# Principles of Volunteer Resource Management

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Module 4: Proactive Program Management, Assessment and Design

- Program Management
- Impact of Policies and Procedures
- Ongoing Program Assessment
- Designing High Value Services
- Staff-Volunteer Training Programs
- Innovative Recruitment Strategies

PROGRAM MANAGEMENT

Time Management

Addressing the issue of “TIME”

“If only I had the time” is the most frequently expressed concern of today’s Director of Volunteer Services. How do you even begin thinking about new, innovative services or those all important process improvements when you are sinking in the daily operations of your existing program?

This should be followed by yet another question: “Why are we so skilled at finding the perfect volunteer match for other departments yet so reluctant to look inward at our own department needs?” Saving the best for yourself has never been more important. Becoming a master of delegation, utilizing skilled volunteers to take ownership of streamlining processes, and taking greater advantage of technology, are important time-saving strategies.

- Where are you currently spending most of your time?
- What are the things you wish you didn’t have to do?
- What are your biggest barriers to getting the job done?
- What is your wish list of things you want to do but just don’t seem to have time to get to?

Conducting your own self-assessment by responding to these questions will give you great insight into things you might delegate and obstacles that need to be addressed. The desired outcome can be freeing up time for a “fresh” look at key program components such as those discussed in this Module. Program assessment, high impact services, and training staff on the “how to’s” for managing department assigned volunteers are key to the survival of the Volunteer Department. On the following page is a sample position description for an Office Resource Volunteer with clearly delegated essential functions that supplement the work of paid staff.
SERVICE GUIDELINES

POSITION TITLE:  Office Resource Volunteer  
DEPARTMENT:  Volunteer Resources  
REPORTS TO:  Volunteer Manager  

PURPOSE:  To serve as an Office Resource for Department of Volunteer Resources, assisting with general reception, mentoring new volunteers, working with Project Depot, tracking compliance with annual mandatories, and helping volunteers with a variety of questions/concerns that may arise.

SHIFTS:  Monday - Friday  8:30 A.M. - 12:30 P.M. and  12:30 P.M. - 4:30 P.M.

ORIENTATION AND TRAINING:
1. Volunteers complete a general orientation before beginning their service specific training and Volunteer Essentials on an annual basis.

2. Service specific training is scheduled with an experienced volunteer and/or staff member working in that area. The Service Guideline is signed at the completion of the training.

3. Volunteers may purchase their uniform in the Volunteer Office at the completion of the service specific training.

4. Volunteers are encouraged to attend annual service review meetings.

5. Cross training in other service areas is encouraged for those who wish to be knowledgeable about the hospital and who might be available to substitute in other areas.

PHYSICAL REQUIREMENTS:
1. Sitting for a four-hour shift to perform clerical functions.
2. Standing and walking occasionally on tile or carpeted floors.
3. Lifting and carrying less than 20 lbs.
4. Must speak clearly in a well modulated voice.
5. Must be able to communicate and hear well over the telephone.

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## ESSENTIAL FUNCTIONS

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<td><strong>1.</strong></td>
<td>Serves as the primary “greeter” to all who call into or enter the Department, displaying strong customer service skills and the ability to properly respond to or direct inquiries or concerns.</td>
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| **2.** | Demonstrates procedure for mentoring new volunteers  
♦ Check your file for any new Buddy assignments  
♦ Communicate, at least once each week, with new Volunteer to see how they are doing.  
♦ Communicate any concerns to Manager  
♦ Close file, by turning in Buddy form to Manager once new Volunteer has purchased uniform, signed guidelines, signed core training checklist and answered other questions at bottom of Buddy form |
| **3.** | Understands process for, and actively participates in, volunteer compliance with annual mandatories. |
| **4.** | Pulls daily patient e-mails from the computer and prepares for delivery. |
| **5.** | Understands procedure for organizing and filing monitor slips from high impact service areas. |
| **6.** | Maintains master forms for service areas and the office and takes ownership of completing paper work for the copy center. |
| **7.** | Understands purpose of, and actively participates in, Project Depot to aid departments with a variety of on-going tasks performed through the Volunteer Office. |
| **8.** | Participates in daily phone reassurance program by receiving calls from Phone Care participants and notifying respondents as appropriate. |
| **9.** | Understands use of the two-way radio to stay in touch with tram drivers for special needs. |

I have reviewed the above information and have been given an opportunity to ask questions.

I understand that it is my responsibility to decline any task that is outside the limits and boundaries of this service guideline and to decline any task that I am not prepared to safely perform.

Volunteer Signature: _________________________________ Date: _________
Project Management for the DVS

From annual awards ceremonies to fundraising events to blood drives, there is no shortage of activities that often fall to the responsibility of volunteer managers. Consider your role as a Project Manager as you go about your work. In many cases, the environment is such that the DVS is constantly multi-tasking, with minimal staffing and restricted budgets. This is precisely the time when good project management skills are essential.

“Project management in the modern sense began in the early 1960s, although it has its roots much further back in the latter years of the 19th century. The need for project management was driven by businesses that realized the benefits of organizing work around projects and the critical need to communicate and co-ordinate work across departments and professions. One of the first major uses of project management as we know it today was to manage the United States space program. The government, military and corporate world have now adopted this practice. Here is the main definition of what project management is:

1. Project management is no small task.
2. Project management has a definite beginning and end. It is not a continuous process.
3. Project management uses various tools to measure accomplishments and track project tasks. These include Work Breakdown Structures, Gantt charts, and PERT charts.
4. Projects frequently need resources on an ad-hoc basis as opposed to organizations that have only dedicated full-time positions.
5. Project management reduces risk and increases the chance of success.”

   Duncan Haughey, Project Smart
   http://www.projectsmart.co.uk

The more projects you have, the more critical project management skills become.
The diagram above identifies the fundamental factors for any project:

1. Projects must be delivered on time.
2. Projects must be within cost.
3. Projects must be within scope.
4. Projects must meet customer quality requirements.
5. Projects must meet customer’s expectations. (It is important to ask the customer what their expectations are. Remember there may be only one customer who defines quality requirements, but there are potentially multiple customers who have key expectations from a particular project.)

The process of organizing your projects using good project management principles may initially seem like quite a bit of work. As you begin applying these principles to each of your projects, you will find that this process will make the flow much smoother, ensure that you are accomplishing the objectives, have appropriate support materials for evaluation, and set you on a steady course in planning for a recurrence of annual or periodic programs. One of the other outcomes of good project management is the ability to elicit the help of others. When you are organized and can communicate your vision and plan with confidence and enthusiasm, others will be willing to assist.

Consider your ability to put together ad hoc committees for planning your special events. There are others in your organizations that are looking for opportunities like these to add to their toolbox of experiences. If they have something to contribute to your project, perhaps there is a way you can put their willingness and skills to work for you.

Tools and Resources

There are many project management programs, toolkits and resources to assist you in gaining more competence in this area. A simple internet search (keywords: project management) will yield a number of free online resources and
templates. Additionally, you will find workshops from 1-day classes to certificate programs to develop these skills to the extent needed.

The ability to be an effective project leader is an essential part of career success for the DVS. There is a unique opportunity in this core competency alone to demonstrate your value to your organization.

**Project Management Software**

Software applications like Microsoft Project can assist the DVS with planning events and programs that require many steps or tasks. It assigns responsibility to resources (example: service chairpersons or committee chairs) with deadlines to insure that the project is completed on time. It can be programmed to compute the costs of projects. It works well with events such as planning recognition dinners or fundraisers. MS Project does require some training for the user to effectively understand the range of services in the program. Many healthcare institutions use it for managing multi-department projects so training may be available through Computer Services or as net-learning modules.

Microsoft Project is “a project software program developed and sold by Microsoft with is designed to assist project managers in developing plans, assigning resources to tasks, tracking progress, managing budgets and analyzing workloads. The application creates critical path schedules. Schedules can be resource leveled, and chains are visualized on a Gantt chart. Project creates budgets based on assignment work and resource rates. As resources are assigned to tasks and assignment work estimated, the program calculates the cost equals the work times the rate, which rolls up to the task level and then to any summary tasks and finally to the project level. Resource definitions (people, equipment, and materials) can be shared between projects using a shared resource pool.”

Source: http://en.wikipedia.org/wiki/Microsoft_Project
Program Management
Summary of Key Points

- Saving the best volunteers for yourself has never been more important.
- Become a master of delegation!
- Utilize technology to assist with project management

Joint Commission Implications

- Utilizing unpaid staff to support the DVS and Volunteer Department requires well written position descriptions with essential functions that clearly SUPPLEMENT the work of paid staff in the department.

Technology Tips

- Project management software products, like Microsoft Project, are great tools to assist with project planning.
IMPACT OF POLICIES AND PROCEDURES

The volunteer services department should operate on well-developed, maintained and communicated policies and procedures, which are reviewed on a regular basis and updated on a continuing basis.

A POLICY is a statement of principle that guides the conduct of operations.

A PROCEDURE is a specific statement of the way a policy will be carried out in a particular institution. Rely on a variety of persons with experience in the work when you create policies and procedures. Be sure to regularly review the procedures for accuracy and validity by establishing a review process.

CONSIDERATIONS FOR POLICY DEVELOPMENT

♦ Write a policy governing volunteer services for your department.

♦ Write (in brief form) procedures that support this policy.

♦ How should policies be formatted?

♦ What are the advantages of using the hospital format?

♦ Where should your policies reside?

♦ Do you have house-wide exposure for key policies that govern the way staff interacts with volunteers and/or the department?

♦ How often are your policies reviewed?

Managers and on-site volunteer supervisors should be able to easily access policies affecting the management of their volunteers such as:

➢ What to do when a volunteer is injured.
➢ Steps to take in counseling a volunteer
➢ User department responsibilities
➢ How to request volunteers for new services.

Policies are now often stored electronically to be available to staff via the institution’s Intranet. Policies need to be reviewed at intervals set by the organization, but minimally every three years.
Sample Document

Department of Volunteer Services Policies
Available in the Human Resources Policy and Procedure Manual on the Intranet

- Competency of Volunteers
- Volunteer Screening and Selection Process
- Requesting Volunteers and User Department Responsibilities
- Orientation / Training / Annual Education
- Developing and Updating Service Guidelines
- Positive Discipline and Termination
- Volunteer On-Duty Injury
- Employee Volunteers
- Relationship between Volunteer Services and the Auxiliary
- Harassment
- Infection Control
- Mass Casualty / Disaster Plan
- Record Retention
A. Recruitment – Volunteer recruitment requires continuous effort to maintain a growing volunteer program. Channels for recruitment include all personal contacts, releases to various media announcing volunteer opportunities, community agencies (i.e., Volunteer Center) and corporate programs. In addition, contacts with schools, churches, business groups and other organizations focusing on community service may be sources for prospective volunteers.

B. Selection/Screening – The screening process consists of completing the application form; return of at least one personal reference; an interview by the Director of designate; and health clearance through Employee Health. As may be appropriate, a second interview by director/supervisor of requesting department may also be included prior to assignment.

C. Orientation – All Volunteers attend a required orientation sessions, which includes pertinent information regarding the history/philosophy of the Sisters of St. Joseph of Orange, Safety, Infection Control, Security and Values Integration. Upon completion of orientation, all volunteers must complete the intake process, which includes:

- Successful completion of Safety Training Questionnaire & background check or reference check clearance
- Clearance by Employee Health
- Obtain Photo I.D. Badge from Security
- Purchase of Volunteer Uniform
- Initial Orientation Training Checklist prior to progressing to next assignment.

Depending on assignment, new volunteers will receive additional training by assignment supervisors or where helpful, will be assigned to shadow an experienced volunteer. User departments are encouraged to develop department specific volunteer orientation checklists to be reviewed by staff and volunteers as part of the orientation process.

D. Placement - Volunteers are given assignments suited to their interests, skills and availability, and which meet the needs and interests of the hospital. Assignments are determined by the Director, following discussion with the applicant and collaboration with department/unit staff where volunteer will be placed. Volunteer assignment descriptions will be given to each volunteer and reviewed with supervisor of utilizing department/unit. A signed copy will be placed in the volunteer file.

E. Recognition – Volunteer recognition is an important, on-going effort to assure appreciation for service rendered. Formal volunteer awards and recognition luncheons are held separately for adult and junior volunteers on an annual basis. Opportunities for individual rewards and recognition are developed each month as feedback is received regarding the individual contribution of volunteers.

F. Annual In-service and Competency Validation- Volunteer re-orientation is conducted annually. In-services and training opportunities will be provided on an as needed basis, to be determined in collaboration with user departments and/or director/staff feedback. Whenever possible, these sessions will be department specific, with user department staff involvement. User Departments are encouraged to keep volunteers updated as policy/procedure changes specific to their areas are implemented. Competency validation tool will be completed for patient care volunteers (nursery and walking companions) at least once every 3 years.

G. Annual T.B. Screening – As required by Employee Health, volunteers will update their TB screening on an annual basis. Reminder notices will be sent to volunteers 30 days prior to due date. Any active volunteer who has not been updated within one quarter of due date will be considered out of compliance and will be asked not to continue in his/her assignment until the screening has been completed.
Employee Volunteers

It is not uncommon for hospitals to provide opportunities for employees to also serve the organization in a volunteer capacity. The “caution” is to make sure you have an “Employee as Volunteer” policy in place and that you are in compliance with the National Fair Labor Standards Act (FLSA) requirements.

By law, non-exempt employees cannot volunteer for the department from which they receive a paycheck or for another department performing the same or essentially the same duties. FLSA prohibits members of management to expect non-exempt employees to work beyond their authorized hours as a volunteer in the department without compensation. Utilizing employees as volunteers within your organization can be mutually beneficial. Employees need to complete a volunteer application and should sign a form acknowledging the requirements of the “employee as volunteer” relationship. Copies of the signed form are kept in the volunteer’s file and the employee’s personnel file in Human Resources.

A sample policy and acknowledgement form is provided on the following pages.
PURPOSE:
To establish a policy regarding employees who elect to also serve as a Volunteer within our organization.

POLICY:
Employees are eligible to volunteer for health care facilities within our organization as long as they: volunteer for a department other than the one from which they are paid, perform volunteer duties different from their duties as an employee, and meet the requirements listed on the Employee as Volunteer Acknowledgment Form contained in this policy.

PROCEDURE:
1. Any employee electing to volunteer for the organization, on a regularly scheduled basis, must complete a Volunteer application and the Employee as Volunteer Acknowledgment Form attached.

2. Volunteer applications and Acknowledgment Forms are available in the Volunteer Offices located on all hospital campuses. Interested employees will be scheduled for an interview at which time the details regarding placement, orientation and training will be shared.

3. Employees cannot volunteer for the department from which they are paid or volunteer for other departments performing the same or essentially the same duties specified in their job description. The Fair Labor Standards Act (a federal law) prohibits employees from volunteering in their own department and prohibits members of management to expect employees to work beyond their authorized hours as a Volunteer in their department without compensation.

4. Employee volunteer hours must not interfere with their employment duties or hours.

5. The completed Employee as Volunteer Acknowledgment Form must be returned to the Volunteer Office prior to beginning training for volunteer duties. Copies of the form are kept in the employee’s personnel file and volunteer file.

-Continued-
EMPLOYEE AS VOLUNTEER ACKNOWLEDGMENT FORM

Thank you for your interest in volunteering for the organization! In order to ensure that everyone concerned understands our policy regarding the limits and boundaries under which an employee may volunteer for one of our facilities, the following acknowledgment form has been prepared.

Please read the form carefully and direct any questions you have to the Director of Volunteer Services or Director of Human Resources prior to signing the form. Once signed, the form needs to be returned to the Volunteer office. A copy of the form will also be retained in your personnel file.

I,______________________________, request to be registered as a volunteer for _____________________ campus/CHA in the following department and service area: ___________________________________________.

I am currently employed in the ___________________________ Department on the ___________________________ campus.

My job title is __________________________________________________________.

My phone number is __________________.

By signing below, I confirm that I have read, understand and agree to abide by the following policies and restrictions:

• In order to volunteer, I must be formally registered with the Volunteer Department. The Volunteer Director/Manager must receive this form prior to beginning my volunteer training. In order to be valid, this form must be witnessed by another adult.
• I understand that I am required to be formally trained in my volunteer role. Topics covered under employee orientation and annual updates may be waived to avoid duplication of training.
• I will be performing services strictly as a Volunteer without coercion by my employer and without compensation for my services now or in the future.
• I will not volunteer, at any time or under any circumstances, in the department in which I am employed.
• I am permitted to volunteer in other departments or programs providing there is clearly no conflict of interest and I choose to volunteer at my request.
• As an employee, I will not perform duties as a volunteer in another department that are the same or essentially the same, as the duties specified in my employment job description.
• I will volunteer only during non-working hours when I am clocked out and officially off-duty.
• If there is any question regarding a particular situation or this policy, I will contact the Director/Manager of Volunteer Services or Director of Human Resources prior to performing any questionable tasks or duties.
• I have read the Employee as Volunteer Policy.

Volunteer Applicant: _______________________________ Date:________________
Witness: ________________________________________ Date:________________

(Volunteer Department Staff Member)
Policies and Procedures
Summary of Key Points

- Policies serve a dual function of not only guiding department operations, but keeping staff informed of the practices that dictate how they relate to, access and supervise volunteers.

- Having selected volunteer policies under a separate tab in the HR Policy and Procedure Manual makes good sense. These should be limited to policies that govern how staff works with volunteers and/or the volunteer department.

- A process should be in place to regularly review policies.

Joint Commission Implications

☑ The Joint Commission requires that processes be in place to ensure that volunteers meet certain requirements. How the process appears on paper is not specifically defined. What is required is clear evidence, via documentation, that the process is consistently being practiced.

☑ Having clearly defined practices written in the hospital’s policy and procedure format enhances general acceptance by staff. In the eyes of the Joint Commission, anything you put in policy you need to be doing with documented evidence of consistent application.

Technology Tips

ощ Policies should be available on your hospital Intranet for easy access by Departments needing to reference these documents.
ONGOING PROGRAM ASSESSMENT

To be an effective, resourceful, and valuable manager, the volunteer administrator must continually assess the following:

- **Culture of the organization**
- **Current volunteer programs**
- **Need for new services**

Assess the Culture of Your Organization

Understanding the culture of the organization, past and present, is key to the effectiveness and success of the DVS. Areas to review include:

- Mission / Vision
- Current year’s goals
- Quality improvement initiatives
- Policy and Procedure Manual
- Personnel policies
- Organizational structure

Knowing the direction the institution is heading is crucial to developing a strategy for the volunteer department. Department goals must be in alignment with organizational goals. What kinds of services will have the greatest impact on organizational goals and process improvement initiatives? Are volunteer resources being used wisely?

The volunteer manager needs to be knowledgeable about external factors influencing health care decisions and be proactive versus reactive in designing services that better meet current needs. Ongoing assessment of what’s already in place will provide valuable feedback.

Assessment of Current Volunteer Programs

An important first step for the new DVS is to become thoroughly familiar with services currently in place. Taking time to learn about existing services and getting to know the volunteer workforce are a vital part of the assessment process. This should minimally include:

- Reading all position descriptions.
- Building relationships by spending time in key service areas.
- Talking with volunteers about their assignments.
- Meeting with staff that supervise volunteers.
The evaluation of current programs is an ongoing process involving the volunteer administrator, staff, and volunteers.

Important questions to ask include:

- Is the service still meeting the needs of the department?
- What could be changed to improve the service?
- Is the service helping to meet an organizational goal?
- Is the coverage adequate?

There are several techniques to use in evaluating existing programs:

- Ask volunteers to evaluate the service.
  - Have annual review meetings with volunteers assigned to the service.
  - Conduct one-on-one conversations with key volunteers.
- Ask staff to evaluate the service(s)
  - Develop an assessment tool to send to all user departments.
  - One-on-one conversations with department staff supervising the volunteers.
- Do your own assessment.
  - Keep statistics on service output.
  - Determine the “value” of the service to the organization.
  - Ask key customers for input.

The DVS needs to beware of the dangers of the comfort zone, maintaining services that have been in place for years simply because they have always been there. With fewer volunteers coming through the doors, it makes sense to concentrate their time in service areas that meet current needs. The volunteer manager needs to know what fits and what doesn’t and be ready to move on! Full attention should be given to “high impact” services, those that focus on exceeding patient/customer expectations or helping to meet an organizational goal.
**Assessing the Need for New Services**

The volunteer services administrator is responsible for forecasting and assessing needs. The ongoing planning process for new, innovative ways to better utilize volunteers sends a very positive message to the organization about the role of Volunteer Services. Some ways to anticipate needs are to:

- **Review organization’s strategic plan and current year’s goals.**
  - Place greater emphasis on outreach and community wellness.
  - Focus on achieving high patient satisfaction.

- **Work with Department Directors and Managers.**
  - Be aware of key goals in the clinical areas and brainstorm ways to be a part of the solution to their challenges.
  - Ask managers questions like “In the best of all worlds, if resources were unlimited, what is the one thing you would do for your customers that you feel would really make a difference?”
  - Maintain open lines of communication with Department managers and stay visible.
  - Develop a strong working relationship with Risk Management, a key partner in the development of “high impact” services and programs.

- **Stay networked with:**
  - The community.
  - Peer volunteer administrators.
  - Local, state, regional and national volunteer organizations.
  - Resources available on the Internet.

**Virtual Volunteering**

Virtual volunteering provides a whole new class of job functions which can be extremely beneficial to Volunteer Departments. Virtual volunteers are those who perform their tasks via the Internet through a home or work computer.

Virtual opportunities could include things such as web page design, programming, developing training modules, virtual mentoring, newsletters or any work that can be completed online. Virtual volunteering allows you to utilize volunteers in new areas and to reach out to those who are not able to, or prefer not to, volunteer on-site.
Volunteer Services Assessment Survey

Help Volunteer Services do a better job for you! Please take a moment to complete the following assessment, and let us know how we can better meet your needs. Return survey to_________________ by ___/___/___

Department          Campus

Team Member Completing Assessment      Extension

• How do you rate the current service(s) provided by volunteers in your department? (circle one)
  BELOW AVERAGE  AVERAGE  ABOVE AVERAGE  VERY HIGH

• Please comment if you indicated AVERAGE or BELOW AVERAGE

________________________________________________________________________________
________________________________________________________________________________

• Are there any SPECIFIC duties that your volunteers DO or DO NOT provide that you would like to comment on?

________________________________________________________________________________
________________________________________________________________________________

• Is the current volunteer staffing level in your department sufficient? ___YES___NO
  If NO please comment:

________________________________________________________________________________
________________________________________________________________________________

• Think “outside” the world of volunteer services for a moment and answer the following question: “In the best of all worlds, if resources were unlimited, what is one thing you would do for your patients (customers) that would really make a difference?”

________________________________________________________________________________
________________________________________________________________________________

• Do you feel your staff would benefit from an in-service on “How to Utilize Volunteers Effectively?”
  _____YES    _____NO

ADDITIONAL COMMENTS:

________________________________________________________________________________
________________________________________________________________________________
STAFF SATISFACTION SURVEY

HOSPITAL MEMORANDUM

Date: May 1, 2009
From: Chief, Public & Community Relations
Subj: Annual Public & Community Relations Survey
To: Service Chiefs/Clinical Center Directors/Program Managers

1. Your assistance in completing this survey about Voluntary Service and Public Affairs will help us to serve your needs. Please circle the most appropriate answer and return to your facility’s Office of Public & Community Relations.

VOLUNTARY SERVICE PROGRAM

a. Are volunteers contributing to the overall performance of your service?
   Yes  No  Sometimes

b. Are volunteers within your service/section performing at a satisfactory level?
   Yes  No  Sometimes

c. In general, are your needs for volunteers being met?
   Yes  No  Sometimes

d. Have monetary gifts, as well as other gifts and donations, assisted in supporting special projects/programs or other services within your area?
   Yes  No  Sometimes

e. General comments regarding Voluntary Service and our medical center volunteers:

______________________________________________________________________
______________________________________________________________________

PUBLIC AFFAIRS & COMMUNITY OUTREACH PROGRAM

a. Are your service specific needs in the area of public relations being met?
   Yes  No  Sometimes

b. Do you feel that the hospital has a positive image in the local community?
   Yes  No  Sometimes

2. Public & Community Relations

c. Do you enjoy the medical center’s newsletter weekly bulletin and bulletin boards?
   Yes  No  Sometimes

d. General comments regarding the medical center’s Public Affairs Program:

______________________________________________________________________

Thank you for participating in this survey.
Ongoing Program Assessment
Summary of Key Points

- Know where your organization is heading and align your department goals with these initiatives.
- Be proactive versus reactive in designing services that better meet current needs.
- The evaluation of current services should be an ongoing process. Be ready to change. Know what fits and what doesn’t.
- Anticipate needs by staying networked with key customers and communities being served.
- When surveying departments, ask the key question: *In the best of all worlds, if resources were unlimited, what is the one thing you would do for your customers that would really make a difference?* Use the feedback from the responses to brainstorm ways volunteer services can make some of these things happen.

Joint Commission Implications

☑ Make sure new services designed are within the realm of appropriate tasks for volunteers and training needs are sufficiently addressed.

☑ The Joint Commission requires that volunteers receive additional training if the range or scope of responsibility significantly changes at any time during the year.

Technology Tips

☐ Learn the word processing and database software that your organization supports to design assessment tools for your department.

☐ Consider sending your departmental assessment form through a broadcast email distribution list.
DESIGNING HIGH VALUE SERVICES

Now more than ever, Volunteer Directors need to take advantage of some incredible opportunities to better position their departments for those highly sought after resources. High impact services that add measurable value back to the organization can make that happen!

High impact services also give you the competitive edge with recruitment and retention. Today’s volunteers are driven by “cause”, doing something they feel is truly making a difference. Having meaningful services that exceed customer expectations provides the necessary ongoing motivation.

In the previous chapter on On-going Assessment areas for seeking ideas for new, innovative ways to create greater impact were identified. Three key arenas are:

- Clinical areas with low patient satisfaction scores
- Community needs identified through discharged patient population
- Key hospital initiatives/goals for the CURRENT year

All hospitals receiving reimbursement for Medicare/Medicaid in-patients have been placed under the “public eye” with mandatory reporting of scores from a national, standardized survey tool called HCAHPS (Hospital Consumer Assessment of Healthcare Providers and Systems). Randomly selected discharged in-patients have the opportunity to share their perspective, with 27 standard questions, on the quality of care and service received. Public reporting of these results appear on www.hospitalcompare.hhs.gov.

Volunteer Services has a real opportunity to impact patient satisfaction! Having at least one high-impact initiative in place that directly links to HCAHPS (pronounced H-CAPS), should be a high priority for DVSs in affected healthcare facilities.

On the following page is an article written by Margie Harris, CAVS on the topic of developing high impact services. This article appeared in the AHVRP newsletter, *Partners in Community Health* (PICH), 2003.
As part of an eight-week Advanced Quality Leadership Series within our healthcare system I was faced with the assignment of writing a paper on a process improvement put in place within the past twelve months that resulted in significant improvement. I chose a more “global” improvement, because it has, by far, created the greatest improvement not just for Volunteer Services but for the organization as a whole. I share this with you. Margie Harris, CAVS

Applying the “WOW” Theory...Developing High Impact Services that Really Make a Difference

Labeling my process improvement the “WOW” Theory approach to service development came about as a result of hearing repeated “WOW” responses from Senior Management when reporting service monitors for “high impact” services. This was triggered by monthly statistics such as 1,750 free van transports, 125 patients fed a meal, 122 grocery and pharmacy pick-ups for the elderly, and the list goes on. Many volunteer programs still focus on traditional services; those geared to health care environments of the past. If reported at all, output measurements for these services might elicit a “that’s nice” response. We wanted a greater impact. Our “WOW” approach takes a totally new look at service development, with patient needs and “value” to the organization at the very heart of the process.

The organization’s definition of quality changed from “meeting” the needs of the customer to “serving” the needs of the customer. For our “patient” customers we moved from meeting the needs of our customers to exceeding the expectations of our customers. This has become our number one criterion for defining a high impact service. Van transportation provides an excellent example. Patients expect to be able to call one of our facilities and secure an appointment for a needed procedure. It’s a service expectation. Exceeding their expectation is to have door to door service provided, free of charge, by one of our volunteer staffed (and funded!) van transportation services. Another example is that patients expect to have a meal delivered three times a day. Exceeding their expectations might be having a Meal Mate volunteer at their bedside to provide feeding assistance or to just offer encouragement and company during the mealtime.

While patients continue to be our primary customer, departments serving those patients, and the organization as a whole, are also key customers. They became the second focus as we continued to look at criteria for “high impact” services. We looked at where we could provide the greatest benefit to the organization, where we might have the greatest impact. We determined that a service would be “high impact” if it met at least one of the following three criteria:

- Exceeds versus meets customer expectations
- Supports an organizational goal or strategic direction
- Helps to grow the business
Van transportation is an example of a service meeting all three criteria...the ultimate achievement for a service. In addition to exceeding customer expectations already mentioned, the van service supports an organizational goal (team goal) to improve overall customer satisfaction scores, and proof of growing the business came from surveys sent to new riders. Over 50% of the customers surveyed the first two years indicated the service influenced their decision to select our hospital.

A key next step in the process was finding a better way to generate new service ideas based on “real” customer (patient) needs. Our previous approach was to survey departments annually and ask: “Is there something else our volunteers can do for you?” Managers responded to this question based on their perceptions of what volunteers could do. Very little in the way of innovative service ideas was ever identified with this approach. A simple re-phrasing of the question created some amazing results. The new approach goes like this: “Put the thought of volunteers aside for a moment, and instead think about this question. In the best of all worlds, if resources were unlimited, what is the one thing you would do for your customers (patients) that would really make a difference?” The end-result...a wish list of services based on real patient needs.

Now we have an “Idea Bank”, real data for a Team “think tank” session. Brainstorming ways to build new “out-of-the-box” services, based on customer needs, is the next step in the process. My team is energized by the prospect of creating yet another high impact service. Some ideas are acted on quickly while others may take weeks and even months of Task Force meetings before a “Go” or “No Go” decision is reached for pursuing a pilot.

High impact services have yet another positive affect on a key customer group, the volunteers themselves. Identifying volunteer needs was another key step in improving our service development process. What were volunteers most looking for from their volunteer experience? What were their needs? We had national survey data to use, but opted to conduct our own survey. Close to 1,000 volunteers across our health care system responded. The top two motivators, which supported national survey data, were:

- Knowing I am supporting a cause important to me
- A sense that my work is truly valued and making a difference

High impact services are meeting these needs!

How are departments, accustomed to requesting volunteers for routine tasks, adapting to this changed philosophy? Services not meeting “high impact” standards are not necessarily going away! They just need to be refreshed! Building some “high value”, “making a difference” duties into more routine service descriptions, holds the key to the longevity of the more traditional services.

Staff education was key to the success of this new philosophy. This is being accomplished through the Integrating Staff and Volunteers training program offered at
the Department level or through monthly CEU accredited classes held throughout the health care system. Evaluations have been very positive! Departments are now beginning to see the “real” impact volunteers can have on improving customer satisfaction scores.

In conclusion, this new **customer driven approach** to service development has proven to be a WIN/WIN for our patients, departments they serve, the organization, Volunteer Services and the volunteers themselves who are finding tremendous gratification from services that truly make a difference. We chose to be proactive in our pursuit of “high impact” services. Our value to the organization is ours to prove!

**Margie Harris, CAVS**
**Morton Plant Mease Health Care**
**BayCare Health Systems**

What are some **“take-aways”** from this article? Possible action plan steps for your own follow-up:

1. What might qualify a service to be **high impact** for your organization? List at least three possible “high impact” criteria you might use.
   -
   -
   -

2. What services already in place qualify as high impact?

3. Where can I get the ideas for new, innovative, high-value services?

4. What steps need to be put in place to evaluate these ideas?

5. Who needs to be involved in building the “pilot” service?

6. What outcome measures can I use to report results?

High impact services, that add measurable value back to the organization, **WILL** trigger the **WOW!**
Designing High Value Services
Summary of Key Points

- High impact services with measurable value back to the organization will help position your department for the future!

- Establishing high impact services starts with identifying criteria to qualify a service for this designation.

- Services focused on patient satisfaction or customer service should be a priority!

- Monitor, monitor, monitor…toot your horn by reporting results.

Joint Commission Implications

☐ HR.01.02.05 requires that the hospital verifies staff qualifications and insures that staff are qualified to perform their duties. This standard includes volunteers and staff.

Technology Tips

☐ List Servs through national, regional and state organizations provide a great opportunity to seek out best practice service ideas!
STAFF/VOLUNTEER TRAINING PROGRAMS

- Gaining Staff Support
- Staff Training

A positive and mutually supportive working relationship between staff and volunteers is absolutely critical to a successful volunteer program. Trust and respect for one another is vital.

Staff should feel a sense of partnership with volunteer services in the design of meaningful services for their department. This creates a sense of “ownership” for the service and those staffing the service. By serving as a catalyst behind this effort, the DVS helps to create an environment of trust and respect for volunteers throughout the organization. The long-term success of the program is dependent upon this happening.

Ideas for gaining staff support include:

- For nursing units, identifying “needs” specific to that unit and customizing the service to meet those needs. It should not be “one size fits all” for unit-based service descriptions!

- Involving front-line staff people in the design of services impacting their department.

- Setting up focus groups with staff to brainstorm new and innovative ways to utilize volunteers.

- Educating staff about the volunteer program and the Department’s mission.

- Allowing staff to participate in interviewing where appropriate.

- Involving staff with training and department specific orientation.

- Keeping on-site supervisor informed about volunteer activities and achievements.

- Meeting regularly with the on-site supervisors/liaisons and providing them with information to take back to the rest of the staff (key “output statistics” on what volunteers have done for their department.)

- Rewarding staff members who effectively work with the volunteers.

- Involving staff in volunteer recognition activities by providing guidance for service level recognition.
Staff-volunteer relationships involve a **three-way partnership**. All three legs are needed to support the structure!

**Training Staff to Work with Volunteers**

Building positive volunteer/staff relationships needs to be supported with training. The DVS should develop a program that can be taken to department meetings, management meetings or special interest groups within the hospital. Content should be specific regarding the “How To's” of managing and motivating a volunteer work force. The program can be designed to meet a variety of time frames and customized to meet individual department needs. This training is especially beneficial for departments with high volunteer turnover or departments wanting to start a new service.

Share your ideas with the Education and Training Department and seek their assistance in putting the curriculum together. Obtaining Continuing Education Units (CEU) accreditation for the course makes it even more attractive for staff to attend.

Course content might include:

- Overview of the Structure of Volunteer Services and Key Policies.
- Legal Considerations ~ what volunteers can and cannot do.
- Frequently Expressed Concerns about Volunteers.
- Benefits of Volunteer Involvement.
- The Basic Steps for Integrating Volunteers into Your Work Unit.
- Tips for Supervising Volunteers.
- The Disciplinary Process – Dealing with a Problem Volunteer.
- What Motivates Volunteers?
- Volunteer Bill of Rights.

The key to having nursing take ownership of their volunteers is to have services so customized to the patient needs of the individual unit that positive outcomes on patient satisfaction soon become a reality. When you reach the WIN/WIN/WIN (patients, nursing and volunteers) ownership becomes a reality. Volunteers become valued members of their team.
Staff/Volunteer Training Programs

Summary of Key Points

- The DVS needs to assume responsibility for taking the lead in developing a climate of trust and support between staff and volunteers.

- Developing a training program for staff on the “How To’s” of “Managing and Motivating an Unpaid Workforce” is an important step in creating a positive climate.

- Staff / Volunteer Relationship training should be required for departments with high volunteer turnover and departments wanting to start a new service.

Joint Commission Implications

☑ Staff who take ownership of their volunteers and create an environment of support and trust are more inclined to stay on top of performance issues and take an active role in the day-to-day supervision of their volunteers.

☑ Assessment of competence requires staff involvement for patient care volunteers.

Technology Tips

☐ Use PowerPoint presentations or computer-based training (CBTs) to train staff on effective volunteer utilization.

☐ Use a “voting button” tool to encourage staff to RSVP for volunteer recognition events. By providing an Email RSVP option of “can attend” or “can not attend” staff can quickly indicate their ability to attend.
INNOVATIVE RECRUITMENT STRATEGIES

Successful recruitment efforts are the result of careful planning and organization. Whether formal or informal, the acts of encouraging potential volunteers to join your program need constant attention. The days of volunteers coming to the hospital because it is the “socially acceptable” thing to do are long gone. Today’s volunteers are driven more by “cause” and “what’s in it for me.” They are less likely to make long-term commitments. How attracted will these newer age volunteers be to your program? What changes need to be made NOW to stay competitive in the future?

Recruitment Planning (Materials borrowed with permission from the Department of Veterans Affairs Voluntary Service Guidebook, 2005)

Regardless of the type of work to be performed, the basic steps of the recruitment process remain the same. Finding volunteers to meet the needs of your program requires careful thinking and planning before an appeal is made. Prior to actually going out and asking people to help, you must:

1. **Design coherent volunteer assignments with well-defined duties by clearly identifying volunteer needs through position descriptions.** Unless volunteer opportunities are well thought out and clearly tied to your mission, you will have an uphill climb with today’s volunteers who are looking for meaningful work. Decide what important goals or initiatives that the volunteer program can support and then see what you need to make it a reality. Identify how volunteers can help and be creative in designing assignments that are both fulfilling to the volunteers and beneficial to the mission. Position descriptions will rise out of this process, which can then be used as you begin recruiting.

2. **Put in place the systems and tools you need to bring volunteers into the program.** Know what you have to offer - the benefits of volunteering. When volunteers respond to your recruitment ads or campaigns, make sure that their questions are answered right away, they are interviewed and trained in a timely manner, and that they are placed as soon as they are ready. Many volunteers are lost through neglect or poor customer service. Begin to recruit only after you are sure you have a process in place for getting them on board quickly.

3. **Know what motivates the potential volunteer.** Before approaching a potential volunteer or partnering organization, anticipate their needs, concerns and desires. Focus on “what’s in it for them” more than your need to fill the position. By addressing their core needs first, you have set the stage for their uncontested involvement in your program.

4. **If composing an ad, be upbeat and informative.** Use the word "want" instead of "need" and never use any form of the word "desperate." The medium you use will depend on your potential volunteers, but your message is far more important than how you get it out. Plan a recruitment approach based on volunteer needs and position descriptions and implement your plan.
Determining Volunteer Motivation

A volunteer program that is well planned and executed and offers meaningful work lays the groundwork for successful recruitment. Once the groundwork has been laid, you are ready to implement your plan and make the appeal. To attract and retain volunteers, you need to know the benefits of volunteering, why people serve and what they gain through volunteer service.

Many factors motivate people to volunteer and individuals may decide to serve for several of these reasons. People may be moved to volunteer by the cause or client being served, the type of work being performed, the opportunities to meet new people, or all of the above! People may decide to volunteer to:

- Improve the quality of life of members of the community.
- Do something useful or enjoyable
- Support something in which they believe
- Do something fun
- Explore new career options and network
- Receive professional experience or training
- Maintain skills during an interruption in paid employment
- Acquire new skills to enhance their marketability
- Fulfill the service requirement of a club, school, church
- Complete mandated community restitution requirements
- Be creative, solve problems, perform challenging work
- Make new friends and affiliations, join peers, belong to a group or community
- Repay what they have received
- Develop and grow personally, cultivate new interests
- Contribute to a cause that is important to them explore their own strengths
- Relieve boredom and monotony
- Feel like they are needed

After collaborating with the departmental staff to clearly identify their volunteer assistance needs, it is time to create a volunteer position description that details their roles and responsibilities. Then you are ready to develop a local recruitment plan.

The process of developing a recruitment plan begins with close examination of the volunteer assignment(s) to be filled. For each assignment, ask yourself:

- Who will be qualified for and interested in the position?
- Who will be able to meet the time requirements of the position?
- Where will you find these people?
- What motivates them to serve?
- What is the best way to approach them?
Developing Creative Assignments

The competition for volunteers is fierce amongst health care organizations, schools and other non-profit organizations. The DVS must be aggressive in his/her approach to volunteer recruitment by developing new and innovative assignments, and periodically re-evaluating assignments that are already in place. In developing these creative assignments, be aware that some new-age volunteers are not looking for a long term commitment, but rather a one-time project or an episodic assignment where they can come in only once in a while. Keep in mind that just because these volunteers serve only occasionally does not mean that they are less valuable than your regularly scheduled volunteers. **It is up to the DVS to ensure that one-time projects and episodic volunteer opportunities are meaningful and make a difference in our ability to care for our patients.**

Getting the Most Out of the Episodic Volunteer

1. **Provide a clear oral statement.**

   Provide a statement of performance standards, work rules, and accepted practices and procedures. The better these volunteers know what is expected of them, the better they can organize their lives to give you their best effort.

2. **Reinforce the significance of their work.**

   If volunteers do not expect to be around long, it is easy for them to assume that if they do not get a job done, someone else will do it. Counter that assumption by showing short-term volunteers how much their contribution matters. Introduce them to the people who use their work, or provide fresh figures showing the impact their efforts have on productivity.

   Do not neglect feedback--if you act like it is not worth your time to praise or correct performance, short-term volunteers can not be faulted for assuming that their efforts do not really count.

3. **Take an interest in their personal life.**

   Nurture the relationship with short-term volunteers as though they were going to be around forever. This may take a delicate balancing act with those volunteers who prefer not to share much about their personal lives.

   For others however, ask about family and social activities. They will reciprocate the interest you show in their lives by showing more interest in your program. When short-term volunteers are especially good, knowing more about their top priorities may help you find more appealing work for them to do.

   In many cases, customer service based assignments such as: patient holiday hospitality table, Christmas gift shop, picnics, escort service, ward visitation, labor (yard work, sweeping, stocking shelves, wiping tables in the canteen dining area, filing, clerical needs, laundry, planting in the garden, etc.), encourages such volunteers to stay for
longer periods than they had originally planned—to the benefit of both themselves and the program.

Everyone who passes through your program, however briefly, becomes a permanent advertisement for your organization. Helping them feel focused and valuable while they are part of your group can have a lasting effect on your program.

**Designing Your Recruitment Strategy**

*One size does not fit all* when it comes to recruitment. There is not one blanket recruitment message that will successfully entice all potential volunteers. Network with other volunteer managers in your area and within your state affiliated groups. Another DVS may have a successful recruitment strategy that you may wish to use as a model for developing your own.

Who you will ask to volunteer and how you ask them depends on the needs of the organization and its primary clientele. Your volunteer position descriptions should reflect those needs and be used in your recruitment efforts. When the assignment requires a specific commitment, a high level of expertise or an ability that is not commonly available, a **targeted recruitment plan** is best.

When the assignment requires no special training or commitment and/or a lot of people, **broad-based recruitment** approaches may be effective. It will be useful for you to establish a recruitment strategy that combines both approaches to accomplish the greatest diversity in your program. In this case, diversity is not just referring to racial or ethnic groups. Your program will need a wide variety of individuals of different ages, skill levels, time commitments, etc. In addition, you will need to prepare for the use of formal (planned) and informal (“word of mouth”) methods regardless of the type of strategy you choose. You will see examples of formal methods within this section.

**Targeted Recruitment** - is specific, focused, and addressed to the audience where you believe that you will be able to find people with the skills, interests and availability needed for the position. It requires you to analyze the position and define, as clearly as possible, the type of person you seek and the type of message that will motivate them to serve.

**Broad-Based Recruitment** - Broad-based recruitment can be effective for positions that can easily be done with minimal training. It is particularly useful when you need a lot of people for a short-term term activity such as a grounds clean-up day.

In a broad-based recruitment plan, the goal is to keep your organization's volunteer needs in the public eye through media campaigns, public-speaking engagements, the distribution of recruitment brochures, and other techniques geared towards the general public.
This can also include:

- Community bulletin boards
- Volunteer newsletters or in-house flyers
- Hospital and outpatient clinic bulletin boards
- Distribution to current volunteers to pass along to friends/family/acquaintances
- Distribution to community group leaders for circulation to their members to announce and promote at meetings
- Local newspapers, churches, service organizations and schools
- Contact with your local volunteer center for referrals
- Web sites

Review your position descriptions to determine which strategy will be most appropriate for filling these assignments.

**Informal Recruitment Strategies**

- **Word of Mouth** – Satisfied volunteers recruit friends.

- **Enthusiasm of Volunteer Services Administrator and Staff** – An enthusiastic staff member displaying a true joy and passion for their work makes potential volunteers WANT to be part of the program.

- **Staff/Colleagues** - Coworkers are impressed with the volunteer contribution to the organization, they let people know.

- **Patients/ Clients** - When patients are grateful for the care they have received, they often "pay back" by becoming volunteers themselves.

Sabrina Coleman Clark, MA, CAVS
Department of Veterans Affairs
Washington, DC
RECRUITMENT ASSESSMENT

♦ What other recruitment avenues have you used?

♦ What has worked best?

♦ What tools are in place to measure which strategies are working best?

♦ Have you implemented a comprehensive recruitment plan?
  
  If the answer is not yet, start a preliminary plan design now.

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<th>COMPREHENSIVE RECRUITMENT PLAN DRAFT</th>
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Implementing the Plan

Although easily regarded as an overwhelming task, recruiting volunteers is often less difficult than it seems. In fact, by the time you have developed position descriptions and considered the questions raised earlier in this section, you have already done much of the work of recruitment. Listed below are more suggestions to help you get started.

- **Take advantage of your existing network.**
  When considering where to start with recruitment, think about beginning with your own family, circle of friends, place of worship, social clubs, etc. Once you have identified your own potential points of contact, ask staff members and auxiliary leaders to do the same. Very quickly you will have identified a number of unique resources for finding volunteers within your community. Remember to consider area businesses or stores within proximity to your facility. Make them aware of your volunteer program and its service to the community. Perhaps they would be willing to assist in some way—by making a monetary or in-kind donation or becoming a sponsor for a special event. “The Power is in the Asking!” Being willing to ask is the core principle in recruitment.

- **Develop partnerships with service organizations and institutions of higher education.**
  Community colleges frequently engage students in workforce re-entry training programs. Do your volunteer opportunities offer work-related skills that would be valuable to one of these programs? Colleges, high schools and youth groups often have internship and service-learning requirements.

  Perhaps your group could offer a service placement. Many community organizations, including veterans’ organizations, fraternal, civic and faith-based, seek out community service projects in which they may be involved. Be sure to consider these groups in helping to serve the needs of your organization. Be creative as you explore partnership options. Once established, these relationships can become long-term sources of volunteers. Some of these organizations even provide administrative support, coaches and volunteer supervision!

**Sharing your recruitment work with others.**

Community groups such as civic, church or student groups often have existing methods of mobilizing and supervising volunteers. Involving them in one-time and ongoing projects can be an efficient way of meeting your volunteer needs. In addition, many large corporations have full-time community relations staff that will actively recruit volunteers from corporate employees. It is important to nurture your relationship with groups that provide volunteers. Know their timelines and their needs.
Work with another community group or organization to staff a volunteer recruitment booth. The collaboration will enable you to cover more territory and learn about other groups and organizations. To ensure the success of such collaborations, however, be sure to carefully outline expectations and duties.

- **Joint marketing and public relations, particularly with area businesses, companies, small and large, want to be viewed favorably by the community.**

  A local business may be willing to develop an advertisement that simultaneously promotes their service and your volunteer opportunities. They may also be willing to provide volunteer recognition gifts or food/supplies for volunteer initiatives.

  “The sky is the limit” with such joint ventures, but remember to ensure that your volunteer program or hospital is not endorsing the products or services of any business or company, nor use promise of future business or the continuation of ongoing business as leverage for their involvement.

- **Collaboration with internal contacts.**

  Internal collaborations are often overlooked but highly valuable. Make it your business to learn where your medical center director has been invited to speak and encourage him or her to mention your recruitment effort. Better yet, if permissible go along with them. Do not forget to look for volunteers within your own organization or agency. Staff members and their families, current and former stakeholders, and other people already familiar with the work of your organization can be great volunteer prospects.

When volunteer initiatives are well managed and individuals are matched to service opportunities that are mutually beneficial to the organization and the volunteer, your recruitment job becomes much easier.

Satisfied volunteers can be strong advocates for your program's mission and a persuasive partner on your volunteer recruitment team. Consider identifying current volunteers to assist you in your recruitment efforts. Remember: *Word of Mouth is still the best advertisement.*

Include ways to keep your organization's name and your need for volunteers in the public eye as part of your strategy. Cultivate friends---keep a finger on the pulse of your community, network, and keep written materials about your volunteer needs up-to-date and visible. People hear a lot of messages every day and while they may not initially respond to your appeal for support, they may remember your organization when they are ready to volunteer.
Planning Tool for Developing a Recruitment Strategy

Setting goals and objectives:

• Where are we now?
• Where do we want to be?
• What changes do we need to make to stay competitive?

Self-Assessment:

• Who do we have now?
• Who, and what skills, do we need?
• When do we need them?
• What are the strongest aspects of this program to promote?

Designing the process:

• What recruitment methods will be most effective?
• What is the time-line?
• How will they be asked?
• Who is the responsible party?
• Is the training program designed?

Evaluation:

• How effective were we?
• What follow-up is required?
• Where do we go from here?
Baby Boomers and Civic Engagement

The latest statistic of the U.S. Census Bureau estimates that there are approximately seventy-seven million Baby Boomers, representing more than 26% of the population. While we notice a tremendous amount of advertising dollars and marketing campaigns focused on attracting the Baby Boomers, we have seen considerably less attention paid to increasing their involvement in civic engagement. Born between 1946 and 1964, the Baby Boomers represent an untapped resource, both human and financial, for non-profit, philanthropic and volunteer organizations.

As we begin our discussion about Baby Boomers, it is significant to note that this group has not traditionally been active in giving and volunteering. In 2005, 33.2% of Boomers volunteered for formal organizations, most of who were also working part-time. Boomers are not only living longer, they are working longer---in many cases to pay off the extraordinary debt they have amounted over the years of luxurious living (compared to their parents) that they strive to continue. With this desire to preserve their youth and all that comes with it, Boomers have found little time for the community service that defines this generation. These were the volunteers/activists that rallied, marched and lobbied for causes such as the Civil Rights and Anti-War movements that changed the political and social landscape of our country forever. Now when we look to motivate Boomers to service through our organizations’ great causes and noble missions, we find that this is no longer the driving force behind their activity.

Understanding that Boomers are “less likely to volunteer out of a sense of duty or obligation, and more likely to volunteer as part of social engagement”¹ is an important thing to note in determining their volunteer behavior and soliciting their involvement. They have a very strong social connection to their communities and are more likely to become engaged in civic activities as a result of just being asked by a close friend or someone with whom they have an established relationship. Additionally, 49.5% of Boomer volunteers are college-educated and tend to volunteer for more than one organization, thus are engaged in very diverse volunteer activities.

Perhaps this information alone provides the DVS with some thoughts about recruiting Baby Boomers as volunteers. Beyond our annual recognition activities, how often do we plan social outings or “get-togethers” for our volunteers? Do we have a broad range of high impact volunteer assignments available from which to choose?

Even if you are able to answer “YES” to both of these questions, remember that these statistics are representing those Baby Boomers who are already volunteering. What about that other approximately 67% of this large generation group that is not serving? What’s stopping them?

There are many barriers to volunteer engagement for the Baby Boomer, much like every other generational group, however there are some unique characteristics of this population that are worth noting.

We will identify them as part of three broad categories:

- **Time Constraints**
- **Scope of Service**
- **Inadequate Volunteer Management**

**Time Constraints**

Time is certainly a factor for everyone in just about every facet of our lives. For the Baby Boomer however, their time is being challenged not only with the increased options they have for leisure, but more significantly by their increased family responsibility. A 2005 survey from the Pew Research Center finds that this responsibility includes raising minor children, providing financial and other forms of support to adult children, and to the care of aging parents. Beyond the Boomer’s affinity to convenience and personal gratification, this certainly explains much of the Boomer trend towards “retirement jobs.” The DVS has the opportunity to reach them through intergenerational assignments designed to allow Boomers to volunteer with their grandchildren and even elderly parents.

**Scope of Service**

We have noted here that the Boomers already have limited time for civic engagement, but the time that they do have available must be well spent. Boomers have been discouraged from volunteering by the lack of position descriptions, being asked to perform menial tasks, and the unclear impact of the work they are doing. Remember that this is the group that led those historic social and political movements of the 60’s. They are willing to work hard for something they believe in and like to do it as part of a team. The DVS must be able to not only answer the inquiries related to what the assignment is, but why it is important.

**Inadequate Volunteer Management**

Technically savvy, socially and politically aware, this highly educated Boomer population comes to our organizations with a great deal of skill and experience. Many of them leaving positions as CEOs and upper management, they expect nothing less from the DVS with whom they may potentially work.

The Baby Boomer volunteer is seeking a well-managed volunteer experience, new and innovative programs, along with opportunities for personal and professional development. They will look for those positions that allow them to exercise their leadership ability, challenge them intellectually or teach them a new skill.

Even if they are retired, they will never tire of learning and…..don’t forget the camaraderie. The challenge for the DVS is to create and manage a volunteer program that is well organized and develops the volunteers that work within it.
Top 8 Tips for Working with Baby Boomer Volunteers  
(According to Joanne Fritz)

1. **Respect their schedules.** Provide flexible volunteer opportunities with short-term timelines.
2. **Treat them as colleagues.** Take advantage of their education and intelligence and make the process as participatory as possible.
3. **Develop opportunities that really matter.** Look beyond traditional assignments. Involve them in goal-setting and decision-making.
4. **Remember that volunteering is optional.** They are not volunteering out of obligation. Let them tell you why they are there and what it is that they need.
5. **Make sure you are organized and professional.** They are intolerant of disorganization and sloppiness. Be clear and be ready to answer questions when they arise.
6. **Train with relevance.** Provide training that is relevant, meaningful, well presented, and develops their potential within your organization.
7. **Reach Boomers through their peers.** Recruit with stories and testimonials. Use nostalgia to reach the older boomers (take a few tips from consumer marketing to this segment of the population.)
8. **Recruit Boomers at work.** That’s where they are and continue exploring opportunities for corporate involvement.

**Intergenerational Planning:**

Attracting the Boomers to your program may seem to be an insurmountable task, but perhaps the greater challenge is preparing for the mixing and matching of your volunteer population. Just as we have done with the Boomers in this section, you will want to understand the traits of each of the generation groups to assist you and your volunteers in communicating and collaborating successfully. The table that follows gives you a glimpse of some key areas you will want to think about when working with an increasingly mixed age group of volunteers.

**Authority:**

Understanding how each of the groups responds to authority may give you some insight as to how they will work under supervision from staff and other volunteers. You may find that your older volunteers will go along with decisions that are made even if they disagree, where the other groups will want to know why and in the case of the Boomer, even propose other options for consideration.

**Work:**

Understanding each group’s notion of work will highlight how they may perceive and go about performing their assigned volunteer tasks. Most people like to have fun at work, but the Boomer-age volunteers and younger demand it. The Matures in the table may identify this as a poor work ethic and lack of commitment, but the DVS will need to
transition these perceptions, along with their own, if this age-diverse volunteer program is to be productive.

**Personal Gratification:**

Understanding what motivates each group is critical in your development of key messages for attracting and retaining volunteers of any age. The Matures and perhaps even a few Boomers will delay gratification for hope of grander rewards, but the GenXers and the Millennials want to know what the reward is upfront before they commit and do not want to wait too long to receive it. This is where the DVS will want to consider interim volunteer awards and other incentives to keep younger volunteers motivated.

**Change:**

As we know, change is a part of everything we do. Understanding how each group responds to change may determine our strategy for communicating issues. This will likely necessitate our need to target messages to each group and allow the DVS to forecast the attitudes and behaviors that follow. For each group, understanding that change is inevitable and the willingness to accept differing viewpoints is essential. The DVS is going to pave the way for the growth and creativity that comes out of this openness and flexibility.

The following page shares information about how people of different generations view and respond to:

- Authority
- Work
- Personal gratification
- Change
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<thead>
<tr>
<th></th>
<th>MATURES/TRADITIONALS</th>
<th>BOOMERS</th>
<th>GEN XERS</th>
<th>MILLENIALS/GEN NEXTERS</th>
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<tbody>
<tr>
<td>Work</td>
<td>Loyalty/Value duty and discipline.</td>
<td>“Live to Work”—Expect to be valued in the workplace/defined by careers and titles.</td>
<td>“Work to live”—expect work to be fun, if not should have other intrinsic rewards, such as training, skill development, opportunities for advancement.</td>
<td>Too early to document their impact on the workplace, but the intuitive DVS will prepare for this generation through an active mentoring program involving individuals of all ages.</td>
</tr>
<tr>
<td>Personal Gratification</td>
<td>“Duty before pleasure.”</td>
<td>Need for convenience and flexibility. Enjoy recognition.</td>
<td>Look to “feel” good about the work they are doing Value making a contribution in the workplace, but put priority to things outside of work (family, social life, education).</td>
<td>Immediate gratification is a must. Will move on the next task or job if gratification is delayed. Shifting priorities dependent upon rewards.</td>
</tr>
<tr>
<td>Change</td>
<td>Resistant to change.</td>
<td>Open to change with reasonable explanation for why it is being made.</td>
<td>Versatile and expect change. Thrive on flexibility.</td>
<td>Expect change, but look for creativity and innovation in problem-solving and new initiatives.</td>
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DVSs spend a considerable amount of time focusing on age diversity within our volunteer ranks. It is very important to note that diversity at every level is the key to building programs that are prepared to adjust to the changing needs of our organizations and the volunteers that serve its mission.

The successful DVS will ensure a stable foundation, lead volunteers through transitions as smoothly as possible, and maintain a vision for continued growth that meets the needs of key stakeholders now and in the future.
Recruitment
Summary of Key Points

➢ To be most effective, recruitment efforts should be thoroughly planned and put on paper in a formal plan.

➢ Be creative and flexible. Adapting your program to meet the changed needs of the volunteer workforce is critical to the success of your recruitment efforts.

➢ Recruitment is ongoing. Involve volunteers, staff and the community in the planning efforts. Form a Task Force to keep recruitment ongoing and effective.

➢ Baby Boomers generally do not volunteer out of a sense of obligation, rather as part of social engagement.

➢ Time constraints, including retirement jobs and caregiver responsibilities, impact the Boomer’s ability to make long-term commitments.

➢ Understanding core characteristics of the Boomer population and other generation groups will assist the DVS in fostering a diverse and productive volunteer workforce.

Joint Commission Implications

✔ HR.01.02.05 The hospital has a process to ensure that a person’s qualifications are consistent with his or her job responsibilities. This requirement pertains to staff as well as volunteers who work in the same capacity as staff who provide care, treatment and services.

✔ While this standard addresses patient care volunteers, it is important to recruit the right people for the right jobs in all cases, with well-defined essential duties to clarify expectations.

Technology Tips

☛ Have your volunteer opportunities listed on your organization’s web site or design your own. Include on-line applications. Technology savvy volunteers can help you with this.

☛ Utilize Internet linking sites such as http://www.VolunteerMatch.org (for non-profit organizations) and with AHVRP at http://www.todaysvolunteer.org match up volunteers and organizations. Volunteer Match even offers remote “virtual volunteering” opportunities.
Congratulations! You’ve learned many things participating in this course. No one can do everything at once. Some sample process improvement ideas are provided to get you started.

Most importantly:

- What will you do in the first 48 hours upon returning to work?

- How will you prioritize the ideas for process improvement that you learned today?

Your Personal Action Plan will help you to prioritize the program areas you wish to review and revise.

Priority 1: Rank your highest priorities for implementing needed immediate change in your program.

Priority 2: Rank areas of change/review that are important, but must come later.

Priority 3: Rank areas of change/review that would improve your program, but are not designated as critical needs.
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