

Mary Washington Healthcare  
**Best Place to Work**

**VOLUNTEER**  
ONBOARDING FOR SUCCESS  
Manager Toolkit



**Mary Washington  
Healthcare**

*Here for You.*



Dear MWHC Manager,

We are delighted to share our new *Volunteer Onboarding for Success* manager toolkit.

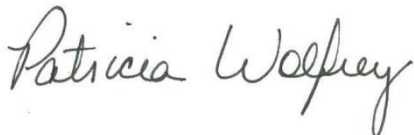
Creating a welcoming environment and ensuring Volunteers are well trained for their roles leads to a more engaged Volunteer. A lot of time and effort has been spent recruiting the area's top volunteer talent and with a few extra steps, we can ensure that our new Volunteers become long-term members of the Mary Washington Healthcare team.

The *Volunteer Onboarding for Success* toolkit readies you with simple, structured methods to aid you in welcoming your new Volunteer and providing them with the information needed to ensure their future success and, ultimately, maximizing their impact on your unit. These tools will guide you through helpful steps to:

- Educate and involve staff on the positive impact volunteers bring to the unit;
- Introduce new Volunteers to their team members and your department's culture;
- Provide immediate access to tools for new Volunteers' success;
- Highlight opportunities to involve new Volunteers in team and organizational activities; and,
- Guide department leaders through retention techniques to keep new Volunteers engaged.

Thank you for taking time to welcome our new Volunteers and making them feel part of our team. Together, we can be the best place they have ever worked!

Sincerely,



Patricia Wolfrey  
Manager, MWHC Volunteer Services



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Setting the stage for success for both you and your new Volunteer is critical.

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This checklist provides suggestion and ideas for you to begin building a strong connection with your new Volunteer before their first day of work. The checklist outlines the initial information each new Volunteer should receive.

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Delegating some things to a new Volunteer's colleague helps reinforce the department's processes and procedures. However, there are some things best suited for a manager to cover during the Volunteer's first few weeks.

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Orienting a new Volunteer can be time consuming. Some tasks can be assigned to the new Volunteer's BFF. A BFF is someone (an Volunteer or another trusted Volunteer) who knows the ropes and is a positive role model. Having a BFF provides new Volunteers with additional support.

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You or a designee should meet regularly with your new Volunteer, allowing time for questions, information, and training. These sample questions give you a good starting point for what to ask as you continue to meet with your new Volunteer.

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This profile gives you the opportunity to gather information from your new Volunteer while sharing your expectations and helping them visualize their success. It can also help determine what additional training/mentoring may be needed.

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## **RECOGNITION PROFILE** **13-13**

This tool allows you to solicit information from your new Volunteer to ensure any recognition given is on target - - meaningful, comfortable, and personal. It also communicates that recognition is important to your department and MWHC.

## SETTING THE STAGE

### What is on-boarding?

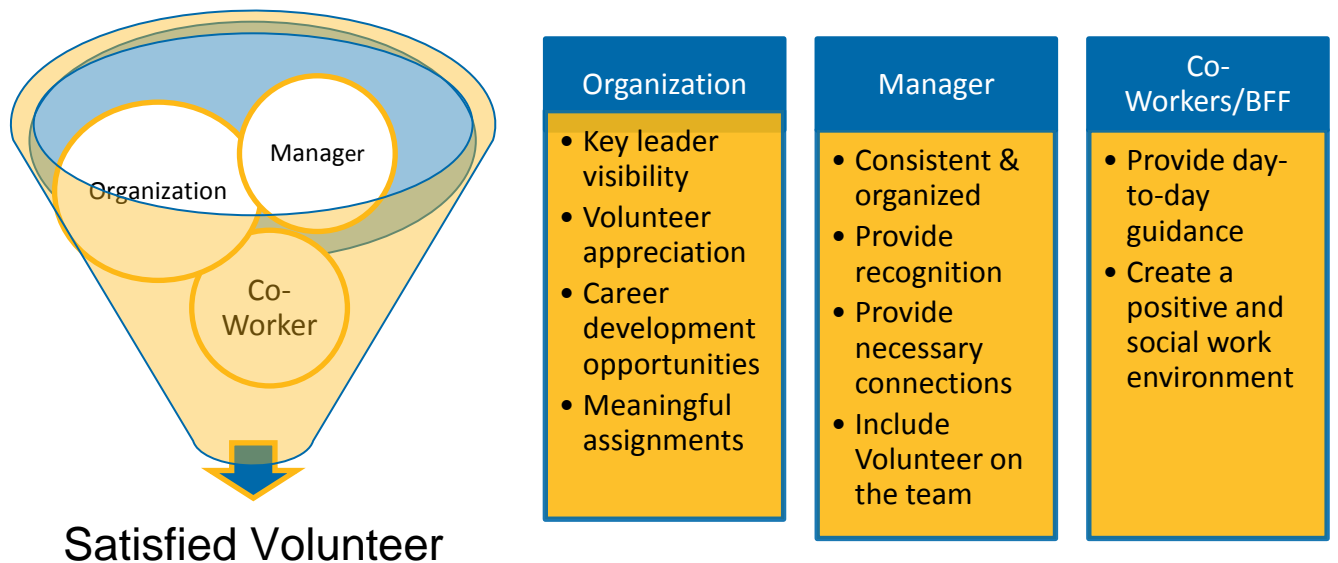
- Getting your new Volunteer up to speed with the policies, processes, culture, expectations, and day-to-day responsibilities of your department/unit.
- Making new Volunteers feel welcome and excited, confirming why they give their time freely to your department/unit and MWHC.

### Why is on-boarding important?

- Builds MWHC's and your unit/department's reputation for being a thoughtful team with great training, clear leadership, and a strong organization.
- Helps to retain your Volunteers.
- Reduces time and costs associated with educating replacement Volunteers.
- Gets new Volunteers to efficient productivity levels quickly.
- Builds a cohesive team, therefore raising everyone's productivity.

### Reducing Voluntary Turnover

MWHC leadership along with the new Volunteer's manager and co-workers must all work in concert to reduce turnover and engage new Volunteers.






## PRE-START CHECKLIST

The following checklist is designed to ensure your new Volunteer feels welcomed and is well informed. We understand that this is the beginning for both you and your new Volunteer; excitement is high and potential is endless! The key to carrying this momentum forward and optimizing your new Volunteer's success is providing a suitable on-boarding experience.

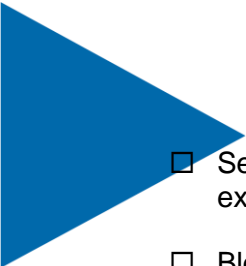

Applying to volunteer with our organization was likely a big decision for your new Volunteer. Once a Volunteer accepts a position, the days or weeks leading up to that first day are critical in building a positive impression and relationship. The steps below will help ensure the connection you build with your new Volunteer is strong from the start.

### After confirmation of orientation from Volunteer Services

- Send a welcome email or place a phone call to the new Volunteer. The new Volunteer has received lots of compliance information from Volunteer Services and may be feeling overwhelmed. Focus on letting the Volunteer know how excited you are to have them join your team in the coming weeks.
- Define the Volunteer's role within the department and share expectations and goals with the team..
- If there is a long period of time between orientation and the start date, stay in regular communication with your new Volunteer (weekly.)
-   **BEST PRACTICE:** send handwritten welcome note from the team.
- Determine who would be a good match to be the BFF assigned.

### 1-2 Weeks before start date

- Submit IS ticket for appropriate system access (if needed.)
- Send email to Volunteer (and copy to Volunteer Coordinator) to follow up and confirm the following:
  - Inform new Volunteer of our BFF system. Share the name, position, and contact information of their BFF.
  - What to expect on that first day.
    - Date and time to arrive the first day in the unit/department.
    - What to bring on the first day in the unit/department.
    - Location to report and who to ask for upon arrival on their first day in the unit/department.
    - What to wear, including job-specific dress code (if different from volunteer uniform.)

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- Send an informal announcement to your department with Volunteer's name and share expectations on how the new Volunteer is to be welcomed.
  - Block time on your calendar for 30, 60, and 180-day new Volunteer retention and success meetings. (See pages 11-12.)
  - Set up appointments with individuals that your new Volunteer should meet within the first few weeks. Include colleagues within our organization and individuals they will interact and work with regularly.
  -   **BEST PRACTICE:** include a sign on the department's bulletin board or the new Volunteer's workstation welcoming them to the team. Include a picture if available.
  - Ensure necessary supplies are available. Plan ahead to ensure that new Volunteers have all the required office supplies on their first day, including pens, paper, post-its, message pads, office keys, etc.
  - Add new Volunteer(s) to appropriate email lists and calendars.
  - Create a department specific schedule for new Volunteer(s) so they have something to do that is meaningful and helps them hit the ground running. The schedule should include a balance of time with others, down time, and time on their own to read orientation materials or complete other orientation-related tasks. Consider including some or all of the following:
    - One-on-one or small group meetings with other team members. During these meetings, team members might describe their work and how it integrates with the work the new team member does.
    - One-on-one meetings with you to discuss job description, expectations, appropriate attire, time, etc.
    - Designated times for the new Volunteer to review relevant policies and procedures.
    - Time alone at their workstation so they can digest all the new information and make notes about what they've learned in meetings.
    - Tour of facility.

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Date

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Manager




## VOLUNTEER INCLUSION CHECKLIST

The following checklist is designed to ensure you continue to welcome and introduce new Volunteers while keeping them well informed. We want to continue to build momentum with the new Volunteer and with the team and provide the tools and experience for success!


### First week at Mary Washington Healthcare

- New Volunteer Orientation (NAO).
- Nursing Unit Orientation and computer training (as applicable).

### First day in department or unit

- Introduce to co-workers/peers.
- Distribute key and/or contact security to grant access to appropriate areas.
- Discuss procedures for scheduling time off and unexpected absences.
- Reiterate appropriate attire and dress code policy for department/organization.
- Provide a tour that offers information as to where the restrooms are located, office supplies, break room, cafeteria, etc.
- Make sure time is allotted for BFF and new Volunteer to get to know one another.
-   **BEST PRACTICE:** have a "scavenger hunt" prepared for new Volunteers within your department that encourages them to find places, things or supplies.

### 2nd week in department/unit

-   **BEST PRACTICE:** Meet with new Volunteer and complete first week check-in. (See pages 9-10.)

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Date

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Manager



## **BFF CHECKLIST**

### **Before new Volunteer starts**

- Work space clean, including computer, phone, trash can, etc.
- Ensure system access has been granted, if applicable.
- Partner with manager to arrange for any welcoming items.

### **Week one (week two for clinical)**

- Meet, greet new Volunteer.
- Walk around and tour key areas of the facility (restrooms) and show work space.
- Introduce new staff member at meetings, breaks, lunch, etc.
- Show kitchen/break room; explain use of refrigerator, oven, microwave, dishwasher; we all clean up after ourselves; recycling.
- Review and clarify all appropriate safety procedures (Safety Manual, fire extinguishers, & Fire alarm and evacuation procedure).
- Demonstrate all office equipment (phones, copier, fax machines, etc.) and location of supplies.
- Provide a list of acronyms typically used in your department. You may be surprised how “foreign” MWHC speak can sound to a new Volunteer.

### **During the Remainder of Month One**

- Schedule a 10-minute meeting once a week with Volunteer to check “how it’s going” and review what has already been covered in the above checklist.

### **Months Two and Three**

- Continue to hold meetings at least every other week, review what has already been covered and add new topics as needed.
- Inform Volunteer of department business and social events; make sure Volunteer knows family is welcome if appropriate.

### **At the End of Three Months**

- BFF relationship may continue informally as desired or needed.





## FIRST WEEK CHECK-IN

**Overview:** This tool equips managers with questions to “jump-start” more meaningful discussion during their check-in meetings with new Volunteer at the end of their first week of employment. These discussions should help managers and new Volunteers develop a positive working relationship and provide an opportunity for managers to identify and address ongoing onboarding problems. New Volunteer feedback collected during these conversations should also be aggregated, analyzed, and used to improve unit and volunteer onboarding processes.

**Time Required:** 10 to 20 minutes

Which team members have you met this week?

*Have you been introduced to key department support personnel and leadership?*

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What have our team members done to make you feel welcome?

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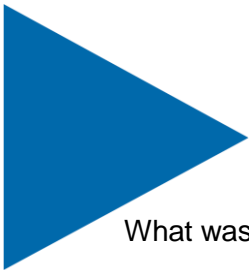
If you had questions, was someone always available to answer them?

*Who has helped you the most?*

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What was the best part of your first week?

*Why did you enjoy that activity/experience?*

*If no answer to initial question, ask, "What activity did you find most interesting?"*

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What was the most challenging thing you had to deal with this week?

*How could we have made that challenge easier to manage?*

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Is there anything that you think we should change to help new staff during their first week on the job here?

*Can you tell me more about why we should make that change?*

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Is there anything that we haven't explained fully?

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*Source: HR Investment Center interviews and analysis*



# 30, 60, & 180 DAY NEW VOLUNTEER RETENTION & SUCCESS MEETINGS

Name: \_\_\_\_\_ Department: \_\_\_\_\_

Manager: \_\_\_\_\_ Volunteer Date: \_\_\_\_\_

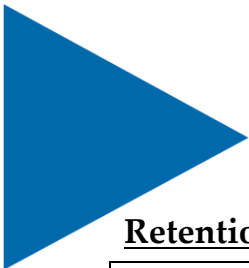
## Position Specific Competencies

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Success Profile

(To be completed by Manager prior to meeting and reviewed for completion with Volunteer during meeting.)

	First 30 Days	First 60 Days	First 180 Days
1. Success looks like: <i>(what has the Volunteer learned or done)</i>			
2. I (or others) will help the Volunteer achieve success by:			



### Retention Profile

	30 Days Date:	60 Days Date:	180 Days Date:
1. How do we compare with what we said in the interview? Is it what you expected? Any surprises? If yes, what?			
2. What's working well? How is your job going?			
3. Has the training been helpful? What training would you add?			
4. Which individuals have been helpful to you? Has your BFF been helpful?			
5. Do you have all the work tools you need? Anything you need that you don't have access to?			
6. Do you know where you stand in terms of your progress since you started?			
7. Based on your past experience, what ideas do you have for improving our processes or operations?			
8. Is there anything that would cause you to think about leaving?			
9. Is there anything you feel "out of the loop" about?			
10. Are you willing to recommend friends for volunteer positions within our organization?			

Additional comments/questions:

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Thank you for your time and feedback.

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Date

Manager

Keep this form with your rounding log, and send a copy to Volunteer Services.





## RECOGNITION PROFILE

Please complete this form to tell us about you. Provide only information you are comfortable sharing with your manager/team.

Name: \_\_\_\_\_ Today's Date: \_\_\_\_\_

Position: \_\_\_\_\_ Start Date: \_\_\_\_\_

Birthday (Month/Day): \_\_\_\_\_

Family & Pets: \_\_\_\_\_

### Favorites

Beverage \_\_\_\_\_

Book/Author \_\_\_\_\_

Color \_\_\_\_\_

Food/Snacks \_\_\_\_\_

Restaurant \_\_\_\_\_

Most Avoided Foods \_\_\_\_\_

Hobby/Sport/Interest \_\_\_\_\_

Movie \_\_\_\_\_

Sports Team \_\_\_\_\_

Type of Music/Artist \_\_\_\_\_

My Hero \_\_\_\_\_



What do you hope to gain from volunteering (educational, helping others, meeting new people, etc.)?

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What type of recognition or praise do you like best (public, private, written, verbal, formal)?

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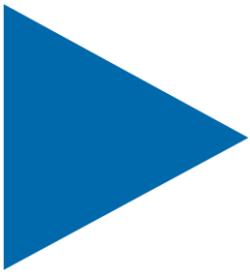
What types of recognition have been most meaningful to you in the past?

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*Source: Adapted from [www.recognitionworks.net](http://www.recognitionworks.net), *Bucket Filling Interview*, and Clark Nuber's form.*



*Thank you for taking the time to utilize this tool. We hope you are able to establish a mutually beneficial, long-term relationship with your Volunteer(s). If you have any questions or need assistance, please contact a member of the Volunteer Services team. Your feedback is appreciated.*

Adele Vogt, Volunteer Coordinator  
Mary Washington Hospital  
[Adele.Vogt@mwhc.com](mailto:Adele.Vogt@mwhc.com)  
540-741-1440

Tammi Ellis, Volunteer Coordinator  
Stafford Hospital  
[Tammi.Ellis@mwhc.com](mailto:Tammi.Ellis@mwhc.com)  
540-741-9660

Patricia Wolfrey, Manager  
Mary Washington Healthcare  
[Patricia.Wolfrey@mwhc.com](mailto:Patricia.Wolfrey@mwhc.com)  
540-741-1452

