

**Streamlining the Volunteer Orientation Process for a Charlotte, NC Nonprofit:  
A Process Improvement Project**

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### **Abstract**

The purpose of the DNP project was to increase the number of volunteers at a Charlotte, NC nonprofit organization to meet the needs of families registered with the organization. The population of focus was new volunteer applicants to the organization. The DNP project focused on communication with volunteers, which targeted four areas of improvement, including the organization's website, automated email correspondence, virtual orientation, and a volunteer tracking tool. The project's success was measured by tracking how many volunteers became active within the organization by attending a volunteer orientation. During the implementation phase, volunteer orientation participation increased by 24% when compared to pre-implementation attendance rates. The results demonstrated the importance of frequent communication with new volunteer applicants. Future recommendations suggest continued utilization of these methods, investment in a text-message marketing tool, and focus on volunteer retention.

*Keywords:* volunteerism, recruitment, retention, nonprofit

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## **Section I. Introduction**

### **Background**

Down syndrome (Ds) is the most common chromosomal condition in the United States, affecting one in every 700 babies born each year (Centers for Disease Control and Prevention [CDC], 2020). Factors that affect the life of an individual with Down syndrome include low muscle tone, heart defects, hearing loss, and speech difficulty. Medical advances have significantly increased the age at which individuals with Ds live, with 80% living until age 60 (National Down Syndrome Society [NDSS], 2021). Medical costs for these families can be 12 times higher than families of children without Ds, and free local resources are limited (CDC, 2020).

The partnering organization is a national nonprofit organization (NPO) that provides free therapeutic, educational, and career development services to children with Ds. The partner organization has over 50 locations throughout the United States and Mexico. The community of Charlotte, North Carolina, brought the organization to the region in 2019. The partner organization is a 501(c)(3) funded through donations and grants and is 99% volunteer-run.

### **Organizational Needs Statement**

The partner organization offers eight in-house programs aligned with the national organization's brand four times a year (Executive Director, personal communication, June 17, 2021). Since the organization is 99% volunteer-run, they rely on a steady stream of volunteers for the programs to function. For example, the literacy tutoring program requires one volunteer for every participant that commits to one hour once a week for six weeks. The organization aimed for the program to run with enough volunteers to serve any number of families who signed up for programs. The operations coordinator for the literacy program stated, "We don't have a

problem finding participants; we struggle to find enough volunteers to meet the needs of our participants. On average, ten families register with the Playhouse each month, but we get only a handful of new volunteers who commit their time" (Program Coordinator, personal communication, June 10, 2021).

Over 200 families in the Charlotte-Mecklenburg region have registered with the partnering organization in Charlotte since 2019. Close to 300 volunteers have registered in that time frame, but only 50 were active in various capacities. The executive director believed this discrepancy was due to gaps in the volunteer recruitment, onboarding, and retention processes. The organization's two-year vision was to nearly double the number of registered families from 200 to 388 by 2023. If the organization were to achieve that goal, it would need to quadruple its number of active volunteers to meet the increased demand (Executive Director, personal communication, February 25, 2021).

The partnering organization positively impacts the North Carolina Institute of Medicine's (NCIOM) 2030 health objectives. NCIOM has identified goals that focus on improving child well-being through exercise, education, and early intervention in the state of North Carolina (North Carolina Institute of Medicine [NCIOM], 2020). Because the organization's programs are run by volunteers and remain free to the community, its mission directly supports the Triple Aim goal by improving the health of a population, improving patient experience, and reducing healthcare costs (Institute for Healthcare Improvement [IHI], n.d). The partner organization contributes to these objectives by supporting families of children with Ds who are often underserved, have higher than average costs, and have worse outcomes.

Increased volunteer orientation attendance strategies are an evidence-based method of growing local communities and potential volunteers (Kappelides, 2019). Creating a streamlined

volunteer onboarding strategy for the partnering organization can increase active volunteers and serve more members of the Ds community.

### **Problem Statement**

The partner organization did not have enough active volunteers to meet the demands of families of children with Ds. The organization lacked a streamlined and reproducible process for onboarding new volunteers.

### **Purpose Statement**

This DNP project aimed to create and implement a streamlined orientation process for a Charlotte-based NPO that offers services at no cost for individuals with Ds. The project increased volunteers' awareness of services and opportunities provided by the partner organization. The expectation was to increase the number of active volunteers at the Charlotte location to meet the demand for free therapeutic services by the families of children with Down syndrome in the Charlotte region.

## **Section II. Evidence**

### **Literature Review**

A literature search was conducted to compile the current research and recommendations for successful volunteer recruitment and retention for NPOs. The primary databases were accessed through ECU Library One Search, including SocIndex and ProQuest. A Boolean search was utilized to produce the most relevant results. In addition to the databases mentioned above, additional articles were found through scholarly reference lists. The flow diagram found in Appendix A illustrates the search strategy. Of the articles chosen for the project ( $n=25$ ), all were read in their entirety and are discussed in the following section.

### ***Current State of Knowledge***

The research available for review discussed what motivates volunteers to join an organization and keeps them engaged. Researchers found many of the same reoccurring themes throughout the literature regarding how volunteers were motivated and recruited and what provided them satisfaction in their roles. The significant results included different motivations for different age groups, employer-supported volunteerism, and perceived communication by the volunteer.

**Age and Generational Impact.** Many studies discussed the significance of age and life stages and their influence on motivating individuals to join nonprofit organizations as volunteers. The age groups most frequently referred to are college-aged, young to middle-aged professionals, and retired individuals. Yamashita et al. (2019), Dyson et al. (2017), and Raposa et al. (2017) all found a positive correlation between an individual's stage in life (early, middle, and late adulthood) and what motivates them to volunteer. The primary motivating factors studied included career advancement, skill and knowledge building, socialization, emotional well-being, and generativity. The researchers found that while knowledge building, socialization, and emotional well-being were equal motivators across all age groups, factors such as career development, skill-building, and generativity were much more age-specific.

Yamashita et al. (2019) suggest that the retired group and ages 65+ found that generativity was a unique motivation for volunteering and was a key indicator to predict the likelihood of an older adult to volunteer. In contrast, researchers found that young adults and professionals were more motivated to volunteer to gain new knowledge and career advancement opportunities. In addition, all age groups found volunteerism beneficial for well-being, humanistic reason, and socialization.



**Employer Supported Volunteerism.** Corporate employees were another common population discussed throughout the literature. Nothwehr & Rohlman (2019) found that employees were interested and willing to volunteer in intra-organizational opportunities. Still, barriers included time restraints, distance to volunteer sites, limited time outside of work, costs, and small staffing numbers. However, more volunteers were likely to participate when the employer could tailor schedules and volunteer sites based on interest and resources. Workplaces that promote intra-organizational volunteer programs can positively influence employees' willingness to volunteer, especially when the workplace partners with a local organization (Scott et al., 2018). These opportunities are more likely to result in long-term volunteer commitment and increase employee satisfaction within the workplace.

**Communication.** Research findings from studies focused on volunteer recruitment and retention named communication as a significant determinant of whether a volunteer chooses to join and remain with a nonprofit. Harp et al. (2017) found that volunteers were less likely to engage or stay engaged in volunteer organizations with constraints and role ambiguity. They suggested that their implications for practice included providing volunteers with the equipment they need and appropriate training for their roles with their findings. These items included job descriptions, handbooks, clear expectations, orientation, and training. Communication strategies also included conducting focus groups with the volunteers, frequent check-ins, and appreciation events for the volunteers to inter-mingle. Williamson et al. (2018) discussed the importance of social support within volunteering for college students, with adequate training and supervision. Kappelides et al. (2019) argue that clear, concise communication before the volunteer even begins plays the most significant role in satisfaction and volunteer retention in the long run.

***Current Approaches to Solving Population Problem(s)***

While studies were abundant regarding what motivates individuals to volunteer, the literature was somewhat lacking in generalizable methods or protocols for how NPOs can overcome the struggle of volunteer recruitment and retention. However, the most common recommendations from researchers focus on targeting the factors that motivated individuals to volunteer. The following categories of recommendations were selected from the literature to best align with the needs of the partnering organization. Other suggestions were acknowledged but did not fit within this project's scope. The three categories of recommendations fall into volunteer recruitment, satisfaction, and retention subcategories. While not all aspects of the following suggestions were implemented in the DNP project, reviewing these recommendations was essential for future volunteer management projects.

**Targeted Marketing and Onboarding Strategies.** As noted in the previous section, the literature suggests that individuals have different motivations for volunteering, even if their task is the same (Clary & Snyder, 1999). One approach existing nonprofit organizations use to recruit new volunteers is a targeted marketing approach based on interest or skill sets. This approach allows organizations to narrow their recruitment efforts to those most likely to engage in the organization. Matching interests, personalities, and skillsets will more likely attract volunteers, increase satisfaction, and lead to better retention rates (Maki & Snyder, 2017). Maki & Snyder (2017) suggest that managers implement a volunteer interest typology tool to help match their volunteers to roles that best fit their interests, such as administrative, autonomy, dependency, donating, building, and environmental. They also suggest these same categories should be used in marketing materials so that potential volunteers know what options are available within the NPO. While there was no substantial evidence that suggested which marketing method was most successful, most studies recommend a mixed-methods approach. This approach included the use

of social media, printed handouts and flyers, radio promotion, local news stations, and neighborhood mailers (Febriani & Selamet, 2020). Kappelides et al. (2019) also found that NPOs that made their newsletters available to the public drew inquiry from potential volunteers. There was even more influence on potential volunteers when newsletters showcased volunteers in action using photos, videos, and personal accounts of volunteer stories.

**Volunteer Retention and Satisfaction.** Harp et al. (2017), Williamson et al. (2017), Trent et al. (2020), and Febriani & Selamet (2020) all discuss the importance of frequent communication and recognition between the volunteers and management team in promoting volunteer satisfaction and retention. The researchers found that volunteers are more likely to stay committed to the organization when the recruitment process is transparent in the NPO's needs, expectations, and incentives. NPOs with the most opportunity for training, mentoring, and support had the highest satisfaction and retention of the volunteers (Kappelides et al., 2018). Communication strategies for frequent and clear communication include frequent emails, monthly newsletters, designated volunteer social media pages, conducting focus groups, regular check-ins, and appreciation events for volunteers to co-mingle (Harp et al., 2017). Same et al. (2020) suggested that NPOs should have large-scale social events annually and regular smaller social events to allow volunteers to celebrate their accomplishments, socialize, and communicate through open feedback channels.

### ***Evidence to Support the Intervention***

After the current literature recommendations were reviewed and compared to the current state of the participating organization, the most appropriate intervention for volunteer recruitment and retention was to implement strategies to increase communication with volunteers. Several areas were identified in collaboration with the executive director where

communication could be addressed. The first area was email communication. An automated email strategy would be used to increase communication between organizational leaders and volunteers. This strategy provided frequent and purposeful communication to keep potential volunteers engaged and excited about the programs and volunteer roles at the organization and highlight the opportunity for reciprocity. For example, upon submitting a volunteer application through the website, the individual will automatically be taken to a “thank you” page that provides a YouTube link showing volunteers at the organization in action. Individuals are more likely to engage with an organization when their personal needs are met through volunteering (Williamson et al., 2017). While humanistic reasons drive some individuals to volunteer, motives such as career development, skill-building, and other perceived benefits are the primary driving forces in deciding to volunteer (Williamson et al., 2017). Therefore, in part of this volunteer recruitment strategy, promoting incentives and reciprocity was built into the model's structure.

### **Evidence-Based Practice Framework**

Understanding what drives human behavior was a critical aspect of this doctoral project. Understanding what motivates an individual to volunteer helped move the project's direction to focus on what mattered to the individual and find ways to meet those needs. The theoretical framework used to guide this project was the functionalist motivation theory, specifically in volunteerism. Clary & Snyder (1999) identified six personal and social functions that help uncover what motivates an individual who chooses to volunteer. These six functions pull from what research has deemed as motivations for volunteerism: *protective*, *values*, *career*, *social*, *understanding*, and *enhancement* (Clary et al., 1998). When an organization can match these motivational functions for individuals, it will prompt them to volunteer to satisfy these needs and sustain their efforts over time (Clary & Snyder, 1999).

The functional theory was an essential aspect of this project as not all volunteers come to an organization with the same level of experience, motivation, and skills. It was part of the organization's role to understand this and adapt to the volunteer's abilities to feel fulfilled in their role (Clary & Snyder, 1999). This theory gave the NPO a framework to develop a communication strategy tool to help them understand which motivators drive potential volunteers and enable them to fill those needs. The table in Appendix B demonstrates how Clary et al. (1998) define each social function and how these functions served this project.

### **Ethical Consideration & Protection of Human Subjects**

In preparation for implementing this DNP project, the author carefully considered avoiding biases and protecting participants from potential harm. As stated in *The Belmont Report*, the basic ethical principles when considering research with human subjects includes respect for persons, beneficence, and justice (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979). *The Belmont Report* also distinguishes between *research* and *practice*, with *practice* referring to processes created or enhanced to improve the lives of an individual. This DNP project was intended to strengthen the preparation for volunteers at the partner organization. It did not involve direct contact with or require the participation of vulnerable populations, nor was there the potential for participants to be taken advantage of during implementation.

The author completed the Collaborative Institutional Training Initiative (CITI) modules and tests with a passing rate greater than 80% and performed a thorough review of the University and Medical Center Institutional Review Board (UMC IRB) to prepare for the approval process of this DNP project. Completing these modules was an essential step in ensuring the rights and welfare of human participants in the research were protected (East Carolina University, 2021).

The DNP project was a quality improvement project. The author acted as an investigator, did not conduct human research, and was approved by UMC IRB.

The partner organization required all volunteers to complete a background check before activity within the organization and a signed code of ethics, nondisclosure agreement, and confidentiality agreement. The DNP student completed each of these organizational requirements before the implementation of the project.

### **Section III. Project Design**

#### **Project Site and Population**

The DNP project was implemented at the organization's location in Charlotte, NC, and through email and video platforms. The population of focus was new volunteer applicants to the organization. The setting and population are described further in detail in the following sections.

#### ***Description of the Setting***

The project took place in person at the Charlotte branch facility and through digital communication via Microsoft Teams. The organization's physical location consisted of an indoor community space with smaller breakout rooms, a classroom, several offices, and a kitchen where volunteers and families participate in activities and programs. Virtual rooms were included in the setting as the author corresponded with volunteers and project team members through email, text, video conferences, and in-person on-site.

#### ***Description of the Population***

The target population for this project was volunteers at the partner organization. The volunteer population was new volunteer applicants. For this project, a volunteer was defined as an individual who commits a variable amount of time to the organization without receiving monetary compensation. Volunteers at this location were required to be 18 years and older, pass

a background check, and agree to sign a code of conduct. Many of the organization's volunteers were skilled professionals, such as occupational therapists and speech therapists; however, specific skills were not required. Volunteer activities ranged from participation in structured programs to cleaning or administrative tasks. Existing volunteers were considered individuals who completed the onboarding process with at least one hour of logged volunteer time. Families and paid employees of the organization were not part of the target population.

### **Project Team**

When designing and implementing the DNP project, support from the project team members was crucial in achieving the project's goals. The DNP project team was comprised of collegiate members and community project partner members who worked cohesively toward the project goals. The collegiate team included the faculty advisor, who served as the student's mentor throughout the project as well as fellow doctoral students who assisted in the writing peer-review process.

The community partner was the executive director of the partner organization, who served as the DNP student's primary contact and project site champion. In addition to the executive director, the organization's board members served as active members of the team as their input was vital to the project's success. Other ancillary members of the community team included the organization's program coordinators, operations coordinators, volunteer coordinators, and interns.

### **Project Goals and Outcome Measures**

The goal of this DNP project was to design and implement a process that increases the rate of volunteer applicants who attended the onboarding process. The areas of focus to reach this goal focused on frequent communication and simplification of the orientation process for the

applicant. Templated emails for initial outreach were designed to be consistent for every volunteer, frequent, engaging, and sustainable in the event of coordinator turnover. The goal of the automated communications was that each volunteer would know the onboarding process steps upon submission of the application process and expectations. The outcomes were measured by comparing the number of individuals who completed orientation during the implementation of the DNP project compared to the number of individuals who completed orientation before implementation.

### ***Description of the Methods and Measurement***

The DNP project consisted of four areas of focus to address the organization's needs. The first area of priority managed was the verbiage on the organization's website. When individuals applied to volunteer via submitting an online Volunteer Interest Form (VIF) to the organization's website, they were directed to a "Thank You" page with no other information. As part of the DNP project, the page verbiage was updated to provide additional details for the applicant, including the next steps of the onboarding process, contact information, a link to view a YouTube video to view volunteers in action, and an invite to join the organization on social media.

The project's next phase was to create a consistent and thorough initial email. An automated email series would be sent automatically to the applicant via Salesforce, a customer relationship management platform (SalesForce, 2021). This templated email contained a welcome message, information for attending orientation, the volunteer handbook, volunteer opportunities, and steps for after orientation. However, the automation ability was disabled by the corporate branch, and the access request was denied. A templated series of emails was created using the organization's Office 365 Suite as a workaround. The volunteer coordinator



manually sent the first email to the volunteer applicant upon receipt of the applicant's VIF. The templated series of emails consisted of two emails leading up to the orientation date and concluded with a follow-up email after orientation. The primary goal of the initial email was to orient the volunteer to the onboarding process and direct them toward a virtual orientation.

The third process of the DNP project was to make orientation more accessible to volunteers. Before the DNP project, orientation was held in person once a month and led by the volunteer coordinator. Several conditions led to transitioning from in-person orientation to a virtual method. The first condition was the volunteer coordinator at the time of implementation resigned from their role, leaving no one to run in-person orientation. The second condition was the COVID-19 pandemic, leaving people less willing to gather in groups. Third, the national flag-ship branch was already providing biweekly virtual orientations (VO). The student and project champion decided to transition orientation to fully remote to allow more accessible, safer access to new volunteer orientation.

The last area of focus of the DNP project was creating a volunteer applicant tracking tool which can be found in Appendix C. This tool served as both a way for volunteer coordinators to track volunteers through onboarding steps and as a method for the DNP student to measure the project's success. The tool was a shared Google Sheets Document stored on the organization's cloud, was an editable document, and was accessible to the individuals involved in the volunteer onboarding process. The tool was color-coded to visualize where each volunteer was in the onboarding process. Volunteers who attended VO were marked green, those who did not attend VO were marked red, and those who needed further follow-up were marked yellow. Communication with the volunteer was also tracked on this form. The tracking tool was monitored by the DNP student, the executive director, and the office intern. Salesforce was

utilized to see who attended orientation and who was ready to move on to the next steps of the onboarding process and begin volunteering.

### *Discussion of the Data Collection Process*

All volunteer applicants applied through the VIF found on the organization's website. These forms were collected through Salesforce and translated to the Google Sheet volunteer tracking form. Each time a volunteer applied through a VIF, the volunteer coordinator added them to the tracking sheet. Data was collected throughout the entire implementation time frame between October 2021 through January 2022. At the end of the implementation phase, the data was compiled into an Excel Spreadsheet for interpretation.

### **Implementation Plan**

The phase began in August of 2021 and is presented in Table 1. The project and implementation plan was approved by the members of the organization's board of directors meeting on July 23, 2021.

**Table 1**

*Project Implementation Timeline*

| <b>Date</b>                      | <b>Steps of Implementation</b>   |
|----------------------------------|--|
| <b>August</b> 26 <sup>th</sup>   | <ul style="list-style-type: none"> <li>● Meeting with the executive director at the organization               <ul style="list-style-type: none"> <li>○ Create email template</li> <li>○ Virtual meeting with Senior Lead of Internal Operations</li> <li>○ Reworked project strategy to align with the scope</li> </ul> </li> </ul> |
| <b>September</b> 1 <sup>st</sup> | <ul style="list-style-type: none"> <li>● Virtual meeting with the project faculty member               <ul style="list-style-type: none"> <li>○ Reviewed implementation plan</li> </ul> </li> </ul>  |
| 9 <sup>th</sup>                  | <ul style="list-style-type: none"> <li>● Meeting with site champion at the organization               <ul style="list-style-type: none"> <li>○ Collaboration with IT Team</li> <li>○ Implement automated email chain</li> </ul> </li> </ul>  |
| 23 <sup>rd</sup>                 | <ul style="list-style-type: none"> <li>● Meeting with site champion at the organization</li> </ul>   |
| <b>October</b> 7 <sup>th</sup>   | <ul style="list-style-type: none"> <li>● Meeting with site champion at the organization               <ul style="list-style-type: none"> <li>○ Re-templated volunteer email</li> <li>○ New automated emails continue to be sent out</li> </ul> </li> </ul>   |
| 21 <sup>st</sup>                 | <ul style="list-style-type: none"> <li>● Meeting with site champion at the organization</li> </ul>   |

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|                 |                  |  |
|-----------------|------------------|--|
|                 |                  | <ul style="list-style-type: none"> <li>○ Reviewed project with operations coordinator</li> </ul>   |
|                 | 28 <sup>th</sup> | <ul style="list-style-type: none"> <li>● Meeting with site champion at the organization           <ul style="list-style-type: none"> <li>○ Automated emails continued to be sent out</li> <li>○ Volunteer Tracking Tool created</li> </ul> </li> </ul> |
| <b>November</b> | 11 <sup>th</sup> | <ul style="list-style-type: none"> <li>● Meeting with site champion at the organization           <ul style="list-style-type: none"> <li>○ Reviewed Volunteer Tracking Tool with site champion</li> </ul> </li> </ul>                                  |
|                 | 18 <sup>th</sup> | <ul style="list-style-type: none"> <li>● Meeting with site champion at the organization</li> </ul>   |

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## Section IV. Results and Findings

### Results

The goal of this DNP project was to increase the number of new volunteer applicants who attended an orientation by 5%. Quantitative data was measured by comparing the number of volunteers who attended orientation during the implementation phase to those who attended orientation before implementation.

### *Volunteer Applicant Demographics*

A total of 20 individuals completed the online VIF during the project implementation phase. All volunteer applications were over the age of 18 years old. The occupation of each volunteer applicant ranged from business professionals (n=8), students (n=3), healthcare providers (n=5), teachers (n=1), and unspecified (n=3). Each applicant provided their contact information and area of interest. Of the 20 applicants, nearly half (n=9) attended a VO session within the implementation timeframe.

### Outcomes Data

New volunteer applicants were tracked and recorded. Comparisons of applicants who attended orientation were compared from two periods of time. Attendance rates from the four-month implementation period was compared to the attendance rate of a four-month period prior

to implementation. Before implementation, the four-month period had 33 applicants, 7 (21%) of which attended orientation. During the implementation period, there were 20 volunteer applicants, 9 (45%) of which participated in an orientation. The project's goal was to increase the number of volunteer applicants who attended an orientation by at least 5%. When the pre-implementation time period was compared with the implementation period, there was a 24% increase in the number of volunteers who attended orientation during implementation, exceeding the goal by 19%.

### **Discussion of Major Findings**

The most significant finding was a 24% increase in orientation attendance when compared to the attendance rate prior to the DNP project. These findings suggest that volunteers were more likely to engage if there was frequent communication between them and the organization. Communication between the organization and volunteers was an essential component of early interaction with volunteers to ensure the development of trust and support before engaging (Kappelides, 2019). Communication that was directed toward volunteers included the website verbiage, the initial email outreach, orientation reminder, and orientation follow-up email. The volunteers who were only sent one email at the time of application were less likely to follow up. Those who received multiple emails and texts were more likely to move through the orientation process than those with minimal communication.

## **Section V. Interpretation and Implications**

### **Costs and Resource Management**

The project's partner organization is 99% volunteer-run, and funds were raised through grants, donations, and fundraisers. The DNP student took caution to avoid adding additional fees to the organization; therefore, only software and materials were already used and allocated

toward volunteer recruitment. Documents, such as the volunteer handbooks and signed waivers, were sent to volunteers via email in PDF format to avoid additional printing fees. Software that the organization had already purchased, such as Salesforce and Microsoft Office, was utilized for volunteer correspondence and tracking, as described in Appendix D.

The VO for new volunteers was an ongoing bi-weekly event hosted by a paid staff member of the organization's national branch. The orientation was built into the national office's staff member's job description and did not cost the Charlotte organization any additional funding. Continued utilization of the VO did not cost the organization any additional fees.

The most significant fee to the organization is the cost of background checks that are run on every volunteer who has direct contact with a program participant, either in-person or virtual. A background check can cost the company anywhere from \$50-\$100 per person, depending on the level of involvement the volunteer may have with the organization (program volunteer vs. board member). To minimize the cost of background checks, this step occurs after the orientation but before a volunteer has contact with program participants and family members. A volunteer who attended orientation may not participate directly with families and participants; therefore, background checks were postponed until the volunteer has committed to a program.

### **Implications of the Findings**

#### ***Implications for the Organization, Volunteerism, and the Down Syndrome Community***

**Implications for the Organization.** Long-term volunteers allow the organization to stay open as they rely on outcomes from volunteer-operated programs to obtain funding and support from the national offices. The more hours logged by volunteers, the more grant money the organization receives. Outside of donation and fundraising, grant money is the primary source of

funding for the organization, a decrease in volunteer hours would be detrimental to the organization's ongoing success.

**Impact for Volunteerism.** As Kappelides (2019) discussed, volunteers expect meaningful roles that provide skills toward higher education, careers, or personal goals. If the organization can meet those expectations through frequent and meaningful communication, they create a fulfilling environment for volunteers. Having consistent volunteers develops a “brand” for the organization and recognizes it as an excellent place to volunteer, harboring a community of volunteers.

**Impact on the Down Syndrome Community.** The partner organization was the first brick-and-mortar place for children with Ds and their families to participate in therapeutic programs explicitly geared to individuals with Ds. They received free therapy, tutoring, other educational courses, and a place to go to have fun and make connections. The increase in volunteers resulted in sustainable programs that deliver services such as tutoring and therapy to the Ds community. Having free services means avoiding high out-of-pocket costs for tutors, therapists, and career development mentors.

### **Sustainability**

The nature of this DNP project was to ensure sustainability despite the fluctuating roles and job titles of volunteers within the organization. Considering the turnover that the partner organization has experienced, it was crucial to build sustainability into the concept of the project. The project was created with resources already available to the organization and did not create a cost burden that may be a barrier to sustainability. Several measures were put into place to ensure sustainability.

First, the Volunteer Tracking sheet was created using Google Sheets to compile new volunteer applicants that lives on the organization's cloud drive. The document was a living file that was shared by all members of the organization who work with volunteers. The document was created to be updated and edited in real-time as an editable document that tracks an applicant's progress through the orientation phase. This document ensured seamless handoff between volunteer coordinators, the executive director, and all involved in volunteer onboarding. Should the role of the volunteer coordinator become vacated, it is clear to the individual taking over the role where each volunteer is within the onboarding process.

Second, templates for outgoing emails were created to ensure consistency and ease of sending the email. Pre-formatted email templates limited the time spent on email correspondence, which decreased the demand for the volunteer coordinator. These templates were easily editable so that when information changed, updates could be made easily and quickly. With a VO follow-through rate of 48%, the volunteer coordinator can limit their time on initial outreach and focus their efforts on orienting attendees who show strong interest and commitment.

Lastly, changing orientation from a monthly in-person to a bi-weekly VO decreased the strain on the volunteer coordinator and provided a safe environment amid the COVID-19 pandemic. While the organization may choose to transition back to in-person as it becomes safe to congregate in groups, VO was effective during implementation as volunteers had more orientation date options and could attend from home. VP was hosted by the national branch staff and remains consistent regardless of staffing at the Charlotte branch.

### **Dissemination Plan**

This project was presented to East Carolina University College of Nursing faculty, staff, students, and the project partner for the DNP project. The poster presentation was held on April 5, 2022, at East Carolina University. Following the poster presentation, the project was submitted to the university's DNP project repository, The ScholarShip.

## **Section VI. Conclusion**

### **Limitations**

During the project's implementation phase, the DNP project team encountered several limitations that changed the course of the project.

The first limitation worth noting was that face-to-face interactions have decreased in the last two years due to the COVID-19 pandemic. The organization saw a decrease in the number of applicants compared to pre-pandemic applications. The decline in volunteer applicants left for a smaller sample size making it difficult to generalize the results. However, an unexpected benefit of a smaller cohort was communicating more frequently with each volunteer and trialing communication such as text messaging.

The second limitation was the lack of data available to compare current findings to previous years since the organization was relatively new to Charlotte and was shut down for nearly a year due to the peak of COVID-19. This cohort was the first large cohort to move through orientation with a systematic onboarding communication process. Data was compared from months prior to implementation; however, the data was limited and taken from a different time of year which may affect the behaviors of volunteers.

The most significant limitation that altered the project's scope was the restrictions placed on the local organization by the national flag-ship branch. In discussion with the national office, there was a hesitancy toward implementing any automated communication. The reasoning



behind this was not elaborated upon, and access to automated marketing tools was denied. The student was unaware of this until it was time to implement, so the pivot to the manual email was made. While the email templates could not be fully automated, the simulation of templated and automated communication showed to be effective. An unintended yet positive effect on the onboarding process, this process can lead as an example and have other branches follow suit.

Lastly, the time frame in which the DNP project was implemented was very limited in the grand scheme of volunteer recruitment at this organization. The project was implemented toward the end of the year when most programs were finishing until after the holidays and new year.

### **Recommendations for Others**

The partner organization was one of over 55 other locations in the United States that recruit volunteers throughout the year. The DNP project showed success in increasing the rate of volunteers who attend orientation. The project could be easily replicated and recommended for other organizations to adapt within their local branches. This project decreases the burden of the volunteer coordinator, which is a time-consuming role.

### **Recommendations Further Study**

The partner organization uses software, such as Salesforce, that can create an automated welcome series for onboarding and training volunteers (SalesForce, 2021). The DNP student recommends that the organization explore those capabilities in providing more immediate and consistent outreach to potential volunteers.

Additionally, volunteers were more likely to respond when a text was sent to them than with an email. Further study is warranted as this was an incidental finding and not a measure set out by the DNP project. Since this role of volunteer coordinator is filled by a volunteer, to prevent

them from using their personal phone, it is recommended the organization invest in a text-messaging marketing tool that allows real-time text communication with the volunteers.

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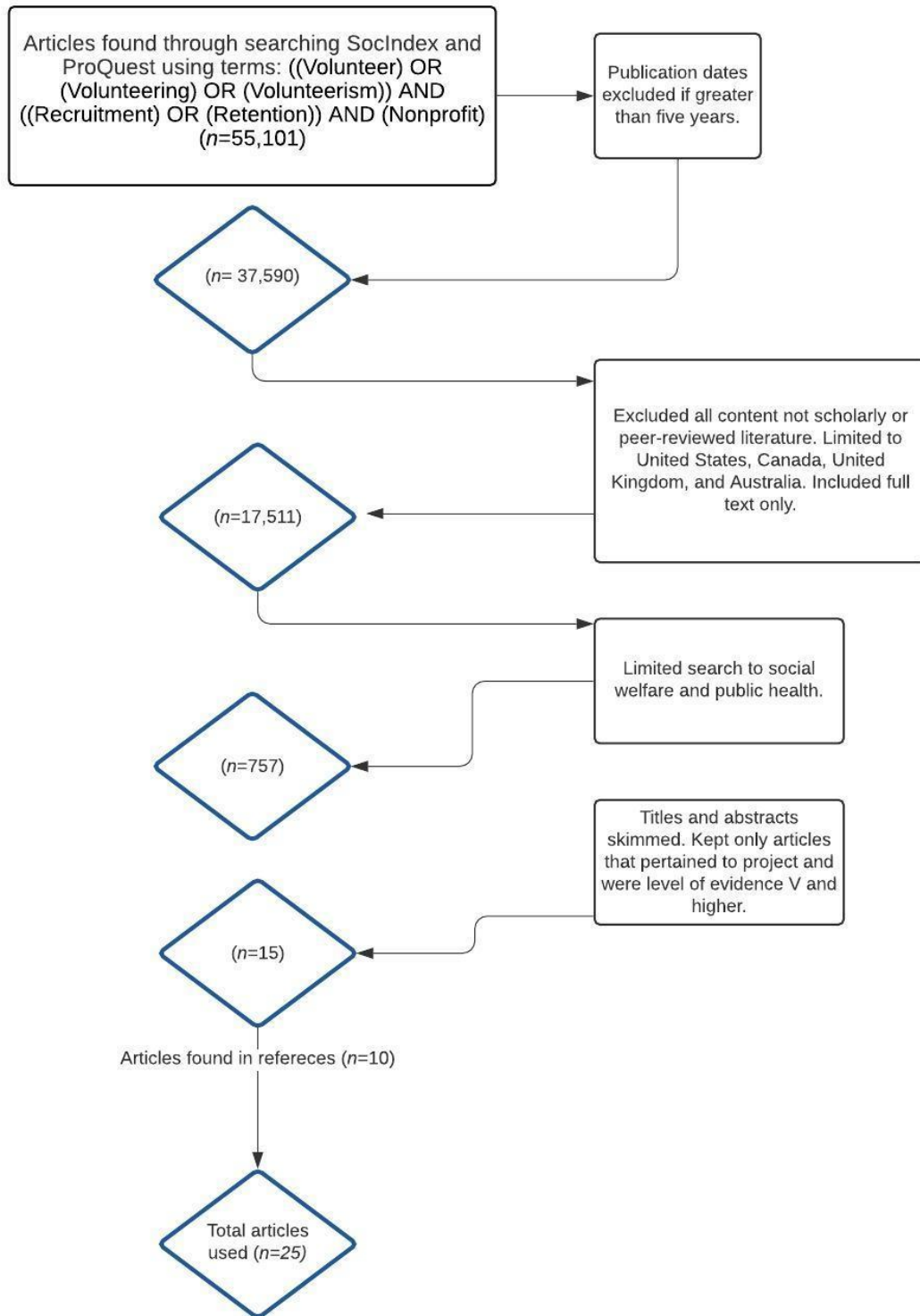
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Appendix A

Literature Review Search Strategy



## Appendix B

### Functions Served by Volunteering

| Function             | Definition  | Application to the DNP Project  |
|----------------------|---|---|
| <i>Values</i>        | “The individual volunteers in order to express or act on important values like humanitarianism.”                | Recruit individuals who volunteer because they express the feeling of importance to help others, potentially a retired group motivated by generativity. |
| <i>Understanding</i> | “The volunteer is seeking to learn more about the world or exercise skills that are often unused.”              | Promote opportunities for a hands-on experience where the volunteer can participate directly in the programs such as literacy or occupational therapy.  |
| <i>Enhancement</i>   | “One can grow and develop psychologically through volunteer activities.”  | Recruit volunteers who find self-efficacy and worth in volunteering.  |
| <i>Career</i>        | “The volunteer has the goal of gaining career-related experience through volunteering.”                         | Communicate the opportunities for young professionals who can gain skills from volunteer work.  |
| <i>Social</i>        | “Volunteering allows an individual to strengthen his or her social relationships.”                              | Encourage groups of volunteers from an organization who wishes to volunteer to share an interest and socialize.   |
| <i>Protective</i>    | “The individual uses volunteering to reduce negative feelings, such as guilt, or to address personal problems.” | Promote the positive atmosphere of the organization.  |

*Note.* The definitions are as explained by Clary & Snyder (1999, p. 157).

### Appendix C

### Volunteer Onboarding Tracker

| Volunteer Tracking List        |           |                  |              |              |                 |  |                |                     |                           |  |
|--------------------------------|-----------|------------------|--------------|--------------|-----------------|--|----------------|---------------------|---------------------------|--|
| Date Applied                   | Name      | Referred By      | Employer     | Phone #      | Email Address   | Area of Interest   | 1st email sent | Reminder sent       | Orientation Date          | Follow-up communication                    |
| 9/22/21                        | Fake Name | Website          | Employe Name | 555-555-1234 | email@email.com | - Cooking Skills<br>- Cleaning<br>- Dance                      | 9/29/21        | 10/27/28            | Attended<br>10/28/2021    | 11/7/21<br>Volunteer Ready                 |
| 10/6/21                        | Fake Name | Friend of GIGI'S | Employe Name | 555-555-1234 | email@email.com | - Education<br>- Fundraising                                   | 10/10/21       | 11/7/21             | Will Attend<br>12/20/2021 |  |
| 10/07/21                       | Fake Name | Unspecified      | Employe Name | 555-555-1234 | email@email.com | - Administrative<br>- Cleaning<br>- Education<br>- Fundraising | 10/13/21       | 10/27/28<br>11/7/21 | Attended<br>11/11/2021    | 11/13/21<br>Volunteer Ready                |
| 10/08/21                       | Fake Name | Website          | Employe Name | 555-555-1234 | email@email.com | Unspecified  | 10/10/21       | 10/27/28<br>11/7/21 | No Attendance             | 11/17/21<br>Volunteer no longer interested |
| 10/10/21                       | Fake Name | Unspecified      | Employe Name | 555-555-1234 | email@email.com | - Cooking Skills<br>- Cleaning<br>- Dance                      | 10/18/21       | 10/27/28<br>11/7/21 | Attended<br>10/28/2021    | 12/8/14<br>Volunteer Ready                 |
| Key                            |           |                  |              |              |                 |  |                |                     |                           |  |
| Volunteer Needs Follow up      |           |                  |              |              |                 |  |                |                     |                           |  |
| Volunteer Ready to start       |           |                  |              |              |                 |  |                |                     |                           |  |
| Volunteer no longer interested |           |                  |              |              |                 |  |                |                     |                           |  |



## Appendix D

### Project Budget

| Item  | Cost         | Comment  |
|---|--------------|--|
| Use of SalesForce                                 | \$0          | Built into organizational overhead   |
| Use of Email                                      | \$0          | None additional  |
| Volunteer Background Check<br>(x9)                | \$450        | Not a direct cost of the project, already a requirement. Each volunteer will have direct contact with participants and will need a background check. |
| Volunteer Coordinator Hours<br>(~8-16 hrs a week) | \$0          | Position is volunteer  |
| Virtual Orientation                               | \$0          | The national branch absorbs cost   |
| Volunteer Handbook                                | \$0          | Emailed via PDF  |
|   |              |  |
| <b>Total</b>                                      | <b>\$450</b> |  |