



**VISIT TEAM LEADER
GUIDELINES**

Revised: May, 2013

As a Holiday Project Visit Team Leader, you are the key to our success. Because of you, thousands of people in institutions will be visited – people who might not have any other holiday visitors or receive any cards or gifts. You provide a special gift for the people you visit, for those who work at the institutions, and for the volunteers who will join you, in search of a fulfilling holiday experience.

These guidelines are organized in a convenient checklist format. Follow each step and place a check in the box when it is complete.

BEFORE THE VISIT

Get trained. Training is easy. All you have to do is:

1. Read these guidelines.
2. Have a conversation with a Holiday Project National Representative.

Choose one or more facilities to visit.

Contact the facility to set up a date and time for your Visit.

Be sure to call early. It takes time to reach people at the facilities. Generally, at a nursing home, the person to contact works in the Activities Department. At a hospital, the person works in the Volunteer Department.

When talking to the facility representative, ask the following questions:

1. How do visitors get to the facility by car?

2. Where should visitors park? -----

3. Can visitors get to the facility by public transportation? -----

4. How many residents will be at the facility on the day of the Visit? _____

5. How many floors/wings are there? _____

6. Is there a room at the facility or is the lobby available for visitors to gather for Opening and Closing Meetings? _____

7. Are there any security requirements or special sign-in procedures?

8. Is photography allowed?

NOTE: Policies governing the use of photography, including digital photography, vary from facility to facility. Many of the patients you will be visiting are unable to make an appropriate determination and some families object to their relatives being photographed. That being said, we understand that volunteers sometimes want to capture a photographic memory of their Visit. If volunteers agree, it is generally alright to take a group picture in the lobby or outside the building, if weather permits; however, refrain from photographing individual residents unless someone from facility management gives permission and signs a copy of a Photo Release on behalf of the resident. If you do get permission, you can email a copy of your photo(s), along with the photo release to sallycooneyanderson@yahoo.com so we can use them on our website and/or Facebook page to help publicize what we do.

Occasionally, the media is interested in covering one of our Visits. Once again, the need to protect patient privacy must be balanced with the desire to promote our activities. If a member of the media contacts you and wishes to cover your Visit, contact the facility to ensure that it is permissible and also contact Robin Wiley, National Publicity Chair, at 703-548-3606 or holidayprojectdc@hotmail.com.

□ Report your Visit plans to The Holiday Project.

The Holiday Project will post your Visit information on our website and will promote activities through public volunteer websites such as VolunteerMatch and Create the Good. E-mail the following to sallycooneyanderson@yahoo.com

1. Your name
2. Your phone number (to be given to people interested in joining you)
3. Your e-mail address (to be given to people interested in joining you)
4. Name of the facilities you are planning to visit.
5. Addresses of the facilities you are planning to visit, including zip codes.
6. Dates and times of visits.

□ Make a Visit Plan.

1. The first 15 minutes, plan to greet visitors, make name tags and have visitors sign in using the Sign-In Sheet on page 5 of these guidelines.
2. Plan to lead a 15-20 minute Opening Meeting. See page 6 of these guidelines.
3. Allow 1-2 hours for visiting. Decide how much time visitors will spend on each floor/wing.
4. Allow 15 minutes for a Closing Meeting. See page 8 of these guidelines.

❑ Create a flyer and/or a sample email message.

Include all the information visitors will need to know, such as:

1. Date
2. Start and end times
3. Name and address of facility (as it is written on the outside sign)
4. Directions by car and parking information
5. Directions by public transportation
6. RSVP information

Sample E-Mail Message

Fill in specific information between the [brackets].

You are invited to join me and *The Holiday Project* this year for a [Holiday] visit to the residents at [Facility Name]. The visit will be held on [Day, Month 00, 2012] from [00:00a/pm] to [00:00a/pm]. The address is [Address].

The Holiday Project is non-profit organization whose volunteers visit people in assisted and independent living facilities throughout the holiday season and on other holidays during the year. Many of the people we visit have no other visitors during holidays so spending time with them is a special treat and a way to share the true spirit of the season. We will be visiting with residents in community areas and one-on-one in their rooms. Prior to the visit, I will lead a short orientation to explain everything you need to know, so it's important to be on time.

Let me know if you have questions and if you can join me.

[Name]

[E-Mail – Phone]

❑ Enroll visitors.

1. Past Visit Team Leaders have informed us that visits are most successful when there is a ratio of approximately 1 visitor for every 10 residents. Ask everyone – friends, family members, coworkers, etc. Imagine that you are inviting people to the best party they will attend all year.

As people express interest, give them the flyer or send an e-mail with all the information.

Sample E-Mail Message in Response to Inquiries

Fill in specific information between the [brackets].

Thank you for contacting me about *The Holiday Project* [Holiday] visit to [Facility Name]. The visit will be held on [Day, Month 00, 2004] from [00:00a/pm] to [00:00a/pm].

DIRECTIONS: [Address, Directions – Driving & Metro, Parking, Where to Meet at the Facility]

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You are invited to bring cards and edible goodies to share with staff and other volunteers, but we do not give edible items to residents, unless we are given specific permission by facility staff. Children of all ages are invited and pets may be welcome. [Confirm with facility.] Holiday attire is especially welcome.

Let me know if you have questions. You can contact me at [E-Mail – Phone]. I look forward to seeing you on our visit!

2. Consider posting your flyer on public bulletin boards near the facility and at local stores.
3. As people enroll, make a list and include phone numbers and e-mail addresses.

Make your Supply Box.

Include:

- Name Tags
- Marking Pen
- Pens and/or Pencils
- A copy of these Guidelines
- Several copies of the Visitor Sign-In Sheet. See page 5 of these guidelines.
- Photo Release Form

If you choose, you can provide your own gifts and/or cards, as long as you have similar items for everyone you visit. If you choose to do this, do NOT give patients/residents food, sharp objects or cosmetics that they may mistakenly eat or drink.

Confirm everyone.

Four to seven days prior to the Visit:

1. Call the facility to confirm. Get the name of the person you will report to on the visit day.
2. Call everyone on your list. Leave messages reminding people of the date and time to arrive. Let everyone know residents at the facility are looking forward to the Visit and their presence will make a difference. Invite visitors to dress in festive holiday attire.

ON THE VISIT DAY

Be the first to arrive.

1. Check in with the facility.
2. Find the room where you will lead the Opening Meeting. If it is not the lobby, ask the first person to arrive to be a front door greeter who directs visitors to the meeting room.
3. Ask the second person who arrives to assist people in making name tags and signing in on the Sign-In Sheet.



**VISITOR
SIGN-IN SHEET**

Facility: _____ Team Leader: _____ Date of Visit: _____ Page ___ of ___

We the undersigned Holiday Project volunteers hereby release The Holiday Project from any and all liability for personal injury and property damage sustained by us and any minors we have with us, arising from our participation.

PLEASE COMPLETE ALL INFORMATION BELOW. The Holiday Project will not share your information with others.

NAME: _____ E-MAIL: _____

STREET: _____ CITY: _____ STATE: _____ ZIP: _____

HOME PH: _____ WORK PH: _____ CELL PH: _____

Signature: _____ How did you hear about this opportunity? _____



NAME: _____ E-MAIL: _____

STREET: _____ CITY: _____ STATE: _____ ZIP: _____

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NAME: _____ E-MAIL: _____

STREET: _____ CITY: _____ STATE: _____ ZIP: _____

HOME PH: _____ WORK PH: _____ CELL PH: _____

Signature: _____ How did you hear about this opportunity? _____

□ Lead an Opening Meeting.

The purpose of the Opening Meeting is to tell volunteers about The Holiday Project, give them an introduction to the facility and the residents and to thank them for volunteering. One of the things that makes The Holiday Project unique is the importance we place on “people being with people”. In addition to anything else we might do, as visitors, we always take time to talk and listen to the people we visit, to spend time with them, to ensure they know we remember them, and to include them in our celebration of the holiday.

1. Introduce yourself and have each visitor do so as well.
2. Say something about The Holiday Project and spend a few minutes talking about the importance of our visit.
3. Ask who has visited in the past and determine which visitors are first-timers. Ask a few experienced visitors to say a few words about their experiences of visiting.
4. If possible, ask a representative from the facility to greet the group and tell everyone about the types of people that reside at the facility.
5. Remind visitors of the following:

DOS AND DON'TS

- You can visit with people in a group or individually. You can visit people in the lobby, halls, day rooms, and in their rooms, according to the arrangement made with the facility. Before entering someone’s room, always knock and ask if that person would like a visitor.
- Spend as much or as little time with each person as is comfortable. One visitor may spend just a few seconds and the next person may spend 20 minutes.
- When entering rooms, look for conversation helpers such as photographs, craft projects and collections. Ask residents questions to engage them in conversation; however, do not ask residents why they are living in a facility.
- Approach people from the front. Give them a chance to see you.
- Refer to people as residents.
- Start by introducing yourself. Use your first name. Ask permission to address people by their first names. You can often find people’s names on their doors, on wristbands and on their possessions, or you can ask. Do not disclose the full names of people you visit to others outside the facility.
- If a resident is in a wheelchair, crouch down to his/her level. Make eye contact.
- Look for hearing aids. Speak slowly and distinctly, directly to people. Do not raise your voice unless you are sure the person cannot hear you.

It is generally OK to touch people, especially by holding hands. Be aware of religious restrictions. If a person pulls away, respect that person's body language and stop touching. Continue your conversation.

If a resident does not verbally reply, he/she may still be able to hear you. Keep looking at the person and continue talking.

Sometimes people will respond with incoherent conversation. That may be their way of communicating. With these people, be more concerned with just being with them than understanding what they are saying. Listen as if you do understand. You can even respond. These people often respond to touch.

If a person wants to hug or kiss you, consider letting that person do it. If you want to hug or kiss someone you are visiting, ask first.

Singing is a wonderful way to share a holiday. It doesn't matter if you are a good singer; join in and have fun!

Policies governing the use of photography, including digital photography, vary from facility to facility. Let volunteers know the guidance you received from facility management.

Do not give residents food or water unless specifically OKed by facility staff.

Do not take residents to the restroom. Ask before taking residents to other floors.

Always thank people for letting you visit them.

6. Evaluate your Visit Plan. If you have more visitors than you anticipated, divide the group into two or three sub-groups and appoint a leader for each one. Have each subgroup begin the visit on a different floor or wing. If time allows, all subgroups can visit all floors or wings. Those we are visiting will enjoy the wealth of visitors. If you have fewer visitors than you anticipated, do not visit the entire facility. No one enjoys being rushed and you want to make sure both the visitors and those visited have a quality experience.

7. Explain your Visit Plan, letting visitors know the floor plan of the facility and how long the group will spend on each floor/wing (usually about 20 minutes). Let visitors know what time to be back for the Closing Meeting.

Conduct the visit.

1. Move from floor/wing to floor/wing as a group.

2. It's OK if people are left behind; be sure to let them know where the group will be visiting next and they will catch up.

3. Allow enough time on each floor/wing to both visit with people in the community areas and their rooms.

4. No matter what the holiday, try to visit with everyone who wants a visitor.

5. It is always a festive idea to sing holiday songs as visitors proceed throughout the facility. Just be sure to spend time talking to people as well.

☐ Hold a Closing Meeting.

Take 15 minutes at the end of the visit.

1. Invite visitors to talk about their experience and the people they met.
2. Thank everyone for attending.

AFTER THE VISIT

☐ Complete a Visit Results Form.

☐ Send thank-you notes.

1. To your contact at the facility. That person will be thrilled to receive it.
2. To those who joined you for the visit.

☐ Acknowledge yourself.

If you visited just one person this year, remember that is one more person that had a visit because of you!