



# Risk Management Considerations for Volunteers

**A** member of a volunteer service organization was involved in a motor vehicle accident while performing their volunteer duties for Christ King Parish. An 82 year old man was rendered quadriplegic as a result of the accident. The volunteer group didn't have insurance and the driver's automobile liability insurance had a limit of \$500,000. The Parish was required to pay the remainder of the \$17 million settlement.

Volunteers can be an important part of an organization. They can provide services that may not otherwise be possible due to personnel and financial limitations and they can also be used to augment existing services. But, if your organization is not careful, a volunteer can become a liability.

People volunteer for a variety of reasons, including:

- Sharing and donating their skills.
- Helping others and keeping their skills sharp.
- Meeting new people, being a part of a team and having fun.
- Exploring a career or earning academic credits.

## Your Volunteer Program

Once the decision to implement a volunteer program has been made, your organization needs to have a plan. When hiring employees, your organization likely starts with a job description, a list of necessary qualifications, the amount of compensation the employee will receive and a disciplinary policy. You should organize your volunteer program in the same way.

There are 13 steps in a volunteer plan:

1. Develop a volunteer policy and procedure.
2. Create a volunteer job description.
3. Communicate the plan to your staff.
4. Prepare screening criteria.
5. Create an advertisement and distribute it.
6. Conduct interviews.
7. Screen potential volunteers.
8. Develop a rejection procedure.
9. Perform orientation and training with new volunteers.
10. Ensure the volunteer has proper resources.

11. Evaluate the volunteer and give feedback.
12. Perform regular recognition.
13. Keep records of volunteers and projects.

### Volunteer Policies

In order for a volunteer program to be successful, the organization needs to develop a clear policy concerning direction and control of volunteers. Volunteer policies are used to clarify the duties of the volunteer and for reference when determining if the person is a volunteer under the organization's insurance policy.

Volunteer policies and procedures also provide your volunteers with clear direction and expectations. This increases their satisfaction with the role and their productivity. When your volunteers are satisfied in their roles, your organization experiences a higher volunteer retention rate.

A volunteer policy should include:

- How and why volunteers are being used.
- Who is defined as a volunteer.
- Level of access volunteers will have to information.
- Volunteer confidentiality.
- Recruitment practices.
- Training.
- Working conditions for volunteers.
- Support and supervision.
- Expenses.
- Insurance.

### Managing the Risk – Volunteer Procedures

When looking to include volunteers in your organization, the following procedures can help to ensure a smooth and appropriate addition.

#### 1. Role Description

- Develop a role description, including:
  - Basic responsibilities.
  - Whether volunteers will work individually or as part of a team.
  - Length of commitment.
  - Number of hours to be volunteered (per day, week, or month).
  - When and where the work is to be performed.
  - If the work is to be supervised.
  - The skills or experience required.
  - Whether the schedule is fixed or flexible.
- Use a chart like the one below when creating a role description:
- In addition, you could use a survey such as the one below to create a role description:

Please indicate if the job requires (yes, no, details):

- Driving cars, trucks, forklifts or other equipment.
- Working around equipment and machinery.
- Walking on uneven ground.
- Exposure to excessive noise.
- Exposure to extremes in temperature, humidity wetness.
- Exposure to dust, gas, fumes or chemicals.

Activity	Never (0 hours/day)	Some (0-3 hours/day)	Often (3-6 hours/day)	Always (6+ hours/day)
Sitting				
Walking				
Standing				
Squatting				
Kneeling				
Reaching				
Push/Pull				
Grasp				
Twist				
Other				

- Working at heights.
  - Operation of foot controls or repetitive foot movement.
  - Use of special visual or auditory protective equipment.
  - Working with bio hazards such as blood borne pathogens, sewage, hospital waste, etc.
- In the role description, address the cost of training, whether expenses will be reimbursed, and what sort of training is required.
  - Ensure that the role description is clear and complete, and that the volunteer base reflects the diversity of your organization and community; in terms of age, sex, and race, and the inclusion of those with disabilities.

## 2. Interviews

- Conduct interviews with prospective volunteers. Ask about their skill and experiences, what their motives for volunteering are to assess their suitability for the role.
- During the interview, make sure you give them information about your organization and include details of the role, including a brief job description.
- Ensure that the interview is conducted in such a way as to avoid any possible discrimination. A rule of thumb to follow is that if information is not allowed to be collected for paid positions, it should not be collected for volunteer positions.
- Examples of inappropriate information to ask are gender, age (minimum age requirement is acceptable), marital status, race, religion, etc.

## 3. Screening

- Perform appropriate screening for the position. Ask the person for references you can contact and screen for interests, skills, schedule, and personality.
- Police record checks are required if the position involves:
  - Unsupervised home visits.
  - Working with children.
  - Working with frail elderly persons.
  - Working with people with disabilities.
  - Handling money and other property.

- Have a written policy in place regarding convictions on Police Record Checks and how often you will require them while a person is in a position.
- If volunteers will be using their own vehicles during their volunteer duties (such as delivering meals to residences), ensure that a Certificate of Automobile Insurance, as well as a Motor Vehicle Accident Report is retained.

## 4. Accepting Volunteers

- When deciding whether to accept or reject a volunteer, consider:
  - The nature of the program, services, and activities.
  - The characteristics of the group to be served.
  - The duty of care your organization owes to participants, staff, and the community.
- When accepting a volunteer, always ask yourself: would you pay this person to do the same job?
- After accepting a volunteer, provide orientation to your organization and proper training for the role they will be fulfilling.

## Rejecting Volunteers

- If you are rejecting a volunteer, inform them either by letter, over the phone, or in person.
- Stress that you are following protocol based on the policy you have in place and explain the reasons for their rejection.
- Offer the person suggestions for building their experience or skills so that they can be successful in the future.

## 6. Review/Evaluation

- Once a volunteer is in the position, make sure you supervise and evaluate them on an on-going basis.
- The higher the risk involved in the position, the closer the supervision should be.
- Advise that reviews will be undertaken and make spot checks of their activities.
- Keep regular notes on the performance of each volunteer and deal with any problems in the same manner you would as with paid staff.

## 7. Volunteer Recognition

- Ensure you put in place a volunteer recognition program in order to show your appreciation for volunteers.
- Consider a “Volunteer of the Month” or “Volunteer of the Week” award, and make sure that all volunteers are recognized individually.
- Send cards to volunteers on their birthdays or the anniversary of when they started volunteering.
- If funds allow, consider an annual volunteers dinner or barbeque to show appreciation.
- It is important to show your volunteers that they are an integral part to your organization and that you value them.

## Developing Your Policies & Procedures

- No need to reinvent the wheel. Your existing employment policies can be used as your starting point.
- Do an internet search. Many organizations post their volunteer policies on their websites.
- Consult your insurance provider. They may be able to provide you with samples. They should be able to provide you with a policy and procedural review once your policy is finalized.

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