
VOLUNTEER MANAGEMENT

Protect your volunteers, your staff and the communities you serve



Introduction

According to a recent Government of Canada report, almost 13.3 million Canadians – the equivalent of 47% of the population aged 15 and over – volunteered for registered charities and non-profit organizations¹. This outstanding level of volunteerism is a testament to engaged and empowered citizenship, and it speaks volumes about the generosity of Canadians who give freely of their time, skills and energy to help build better communities.

Today, as registered charities and non-profit organizations struggle with reduced funding, the work of volunteers is more important than ever before. Volunteers provide assistance in virtually every aspect of an organization's efforts – from program delivery and fundraising to event planning, communications and marketing. And whether they serve on Boards and committees, as administrative help, religious school teachers, sports coaches, school trip chaperones, hospice workers, museum guides or in a host of other roles, volunteers contribute their skills, enthusiasm and diverse experiences. They are steadfast ambassadors to the community and, most importantly, they extend the resources and reach of the organizations they join.

Just as the work of volunteers is important, so too is the management of volunteers. Whatever the size of your organization – whether you are a registered charity or a non-profit organization or association – a formal Volunteer Management Program can protect your volunteers and staff, the communities you serve

and your reputation. It can also motivate and inspire everyone involved and send an important message about your organization's leadership and its role in the community.

This White Paper highlights some of the best practices included in a Volunteer Management Program.

"Canadians volunteer for over 161,000 voluntary organizations in the areas as diverse as health care, social services, sport and recreation, faith communities, arts and culture and education."²

Developing a Volunteer Management Program

A Volunteer Management Program should be aligned with your organization's goals, policies and resource allocation. It should have the input, approval and active support of your board and senior management. And it should be applied consistently across your organization.

Typically, a Volunteer Management Program includes the following key stages:

- A.** Procedures, Protocols and Job Descriptions
- B.** Recruiting, Interviewing and Screening
- C.** Orientation and Training
- D.** Ongoing Supervision and Evaluation
- E.** Appreciation and Recognition
- F.** Feedback and Retention
- G.** Volunteer Risk Management

A. PROCEDURES, PROTOCOLS AND JOB DESCRIPTIONS

The first important step in developing your Volunteer Management Program is to define the program's mission as well as the procedures and protocols that will guide it. Among other things, you should detail the ways in which your organization will handle emergencies, grievances/harassment, personal information and privacy, health and safety, and reference and background checks.

The next step is to create detailed job descriptions that outline the requirements and duties for each

volunteer position. Comprehensive job descriptions will formalize the goals and expectations for each role, allow you to define any risks associated with volunteer assignments – for example when volunteers will be working with vulnerable children, youth or adults – and help you match the volunteer to the task. Volunteer job descriptions are an integral part of risk management.

B. RECRUITING, INTERVIEWING AND SCREENING

Recruiting

Organizations have traditionally recruited volunteers through personal referrals, speaking engagements, public service announcements, mass and local media, outreach to community groups, etc. Board members – who are volunteers themselves – are often called upon to 'spread the word' and enlist the support of their network of colleagues and friends. Today, in addition to these approaches, there are many social media platforms and websites (including your own) where you can post your organization's needs and volunteer opportunities. However, while new technologies may make recruiting seem easier and faster, your organization should proceed carefully. Choosing appropriate websites, blogs, and other social media will help protect everyone involved.

Whichever venue you use, it is important to consider your recruitment message as an integral component of your overall communications strategy. While you may tailor individual messages to the specific volunteer roles required, your overall positioning should be consistent. A well thought-out and well-articulated message will help educate the public about your organization and build positive public perception.

Interviewing

Well-matched volunteers help ensure the success of your volunteer program. They also help you manage potential risks. To that end, personal interviews with prospective volunteers are essential when they will be tasked with a sensitive assignment – for example, to work with young people (sports teams, school trips, after school programs, mentoring students, religious schools, etc.), the elderly (in retirement homes, hospices and other health care facilities), vulnerable adults (the homeless, developmentally challenged, Alzheimer's patients etc.). A personal interview affords the best opportunity to share your organization's vision, mission and goals and to learn more about the prospective volunteer's values, background, and experience. It is the ideal way to determine compatibility, to see if it will be

a 'good fit' for both parties. During the interview, communicate your organization's policies and procedures, review the job description and, based on the nature of the position, outline the screening requirements. From the outset, volunteers should understand the responsibilities associated with their positions and should be aware that supervision and regular performance reviews are part of the volunteer program.

Screening requirements and procedures will differ for each non-profit organization based on the level of risk to which participants are exposed.

Screening

The first component of the screening process is, in fact, the application form.

This document should collect basic information – name, address, etc. – as well as information specific to the job's requirements. It should also give your organization permission to undertake general reference checks as well as police record checks, if required.

When requesting information – on the application form or during the interview – make sure that your organization complies with the privacy laws and legislation of the Human Rights Commission or Council in your province or territory.

A volunteer handbook should include your organization's history, mission, values and strategic goals; policies that impact volunteers; procedures that volunteers must follow; as well as the Volunteer Coordinator's contact information.

Personal Reference Checks

Reference checks are critical to the screening and selection of volunteers. References help confirm the experience and skills of the applicant and provide insight into the applicant's character and suitability. Whenever possible, you should ask for and contact more than one personal reference. Having a reference check 'script' will help ensure that all questions are asked, that such calls are handled consistently and that conversations do not veer off course.

Volunteers should sign a feedback form indicating that they have read and understood all the information in the handbook. This will be an important part of your records.

Police Record Checks

If a volunteer will be working with vulnerable children, youth or adults, a Vulnerable Sector Police Check (VSPC) is vital. As prescribed by the Criminal Records Act, however, any person undergoing a vulnerable sector search must first consent to that search being done.

The main difference between a VSPC and a regular Criminal Records Check (CRC) is that the former will include any pardoned sex offences. According to the RCMP, "the criminal history information about an individual convicted of a sexually based offence is retrievable by law enforcement after a fingerprint search has been conducted only for the purposes of a vulnerable sector search, even if that person has been granted a pardon."

C. ORIENTATION AND TRAINING

Orientation

Even the smallest non-profit organization should have an orientation component in its Volunteer Management Program. Generally, orientation sessions should familiarize volunteers with your organization, introduce them to their supervisors, and include an overview of risk management policies and procedures designed to prevent accident or injury to both employees and volunteers. While these sessions may entail some cost, the benefits

cannot be overestimated. Your organization will have better informed and better prepared volunteers. You will also ensure a safer and more collegial work environment, foster a more robust culture of volunteerism, and, most importantly, benefit from better job performance.

Training

Training provides the direction and skills volunteers need to carry out their assigned tasks and it keeps them motivated and committed. The level of volunteer training that you provide will ultimately be determined by your organization's mandate and scope. There are no hard and fast rules except that some form of training is highly recommended, especially when volunteers will be working with service recipients.

Training can be formal or informal. It can take place on a one-to-one or small group basis. It can include workshops, conferences and seminars. And it can be delivered via the Internet using a combination of written material, podcasts and/or Webinars.

Training sessions can be handled by outside professionals, senior staff, volunteer coordinators and even volunteers who have a proven history with your organization. Training can also consist of a series of self-study training modules, along with audio/visual and self-paced learning resources.

Providing reference tools and guides is an important part of the training process. Volunteer reference material can be as simple as a booklet that highlights your mission and values, reviews volunteers' roles and responsibilities, and details protocols for safety in the workplace, privacy, etc.

D. ONGOING MANAGEMENT, SUPERVISION AND EVALUATION

Ongoing Management

In most ways, managing volunteers is no different than managing employees, however there are important differences to consider – for example, the services performed by volunteers may be different than those performed by paid staff, volunteers are often free to choose their hours of service, most work less than full time, etc. These differences can influence the kinds of relationships that develop between staff and volunteers and should be

addressed as part of the Volunteer Management Program. By fostering healthy interpersonal relationships amongst staff and volunteers, everyone benefits. Establishing clear guidelines for both employees and volunteers will help achieve this goal. As will creating opportunities and venues for volunteers to seek support, to ask questions and to clarify tasks.

Supervision

It is important to assess the level of risk associated with a volunteer's position in order to determine how much supervision the individual requires. Volunteers working with the vulnerable sector should be highly supervised and spot checks regularly conducted. All volunteers should be placed on probation for a minimum of 3 months and for those working with

children, a probation period of 6 months would be ideal. The probationary period benefits both the organization and the volunteer. Frequent feedback during this time allows the organization to assess the volunteer's suitability and allows the volunteer to ask questions.

Evaluation

Regular performance evaluations provide excellent opportunities to discuss a volunteer's progress and performance and to ensure that they continue to be suitable for the role. Evaluations are especially important for operations level volunteers who are integral to your organization's program delivery.

Performance evaluations should be used in a constructive way to recognize and praise good work and/or to identify where improvements can be made. These sessions also provide an opportune time to invite feedback from the volunteer. In fact, the insights of volunteers who are on the front line can be invaluable to your organization's planning and program delivery.

E. APPRECIATION AND RECOGNITION

Volunteers give freely of themselves to help organizations achieve their goals and it is important to acknowledge their contributions. Whenever possible, your organization should praise and promote the work of volunteers. If you publish a newsletter, an annual report and/or have a web site, you can include regular stories about your volunteers' services. You can also highlight their work by posting photographs and blurbs on bulletin boards, and you can reference their contributions in speeches and interviews.

However your organization chooses to do it, ongoing appreciation goes a long way towards volunteer retention. It sends an important message about how your organization values its volunteers, and it can enhance the culture of volunteerism in your organization and community.

F. FEEDBACK AND RETENTION

When a volunteer leaves an organization, for whatever reason (e.g. their capabilities fell short of evolving needs, the project was completed, they are no longer able or willing to give of their time and effort, etc.), every effort should be made to conduct an exit interview. Their experience in the job, their views on your training, supervision and recognition efforts, their relationship with paid staff, as well as health and safety issues are among the topics that should be covered.

The information gained from an exit interview can provide valuable insights into such areas as recruitment, the volunteer experience, volunteer supervision, and much more. It can help reduce turnover and improve retention rates. It can also help your organization improve business practices and implement new initiatives.

G. VOLUNTEER RISK MANAGEMENT

A systematic approach to risk management can help your organization prevent, control and mitigate risks. If an unfortunate event occurs, a well-documented risk management plan would also serve as a record

of your efforts to create a safe environment for volunteers, employees, and the community or communities you serve. There are several categories of risk to consider, among them:

- a.** There is the risk of injury to volunteers, for example:
 - A volunteer uses a ladder, falls and suffers a serious injury.
- b.** There is the risk of injury caused by volunteers, for example:
 - A volunteer does not follow food handling safety procedures in a cafeteria.
 - A volunteer uses a personal vehicle while 'volunteering' and causes an accident and personal injury.
- c.** There is the risk of injury caused by volunteers, for example:
 - A volunteer allows a community group to hold an event on your premises without the knowledge or prior approval of supervisors or managers.
- d.** Should your organization be involved in a lawsuit, there is the risk of personal liability for your volunteer Directors and Officers. Allegations can range from wrongful employment practices to breach of fiduciary duty and duty of care. Employees, other volunteers, and even the general public may make claims.

Managing the risks

Volunteers should not be permitted to perform any potentially hazardous maintenance work to either your building or grounds. While they may undertake simple tasks like mowing the lawn, they should not be doing any roof work. All tasks that pose hazards should be carried out by your trained staff or contracted professionals.

While there is no difference between your volunteers and your paid staff when it comes to protecting their health and wellbeing, there is one caveat. In many provinces volunteers are not covered by either Workers Compensation or by any Employment Acts. According to a 2009 study undertaken by the Institute for Work and Health, none of the territorial and provincial Occupational Safety and Health (OSH) acts clearly state that paid or voluntary workers in non-profits are covered. At that time, four jurisdictions

– Alberta, Northwest Territories, Nunavut and Quebec – included volunteers. Ontario was the only jurisdiction that excluded volunteers from coverage³.

With respect to damage caused by volunteers, non-profit organizations can be held liable for the actions of volunteers while they are providing service on behalf of the organization. So it is very important to train volunteers well and to provide written documentation that clearly defines the 'do's and don'ts of the job. Ongoing supervision and follow-up are equally important. They will not only prevent a volunteer from causing harm but may uncover any complaints related to a volunteer's performance. All complaints should be thoroughly investigated and documented and proper action taken with regards to discipline or dismissal.

To manage risks and mitigate losses, make sure that your organization:

- Completes all references and background checks.
- Undertakes regular evaluations of volunteers.
- Complies with all government regulations and guidelines, including applicable Occupational Health and Safety Regulations.
- Has procedures in place for conflict resolution.
- Provides adequate training for all volunteers, especially volunteers in sensitive assignments.
- Has adequate insurance coverage, with a policy that extends liability coverage to volunteers.
- Contracts all high-risk transportation – e.g. driving a school sports team to a game or to an out-of-town event – to a professional third party service.
- Protects Directors and Officers with D&O liability insurance.
- For low-risk transportation – e.g. a volunteer uses their personal vehicle to make a delivery on your organization's behalf – it is important to have non-owned auto insurance coverage along with your commercial general liability policy.
- Carries out the supervision and monitoring procedures outlined in the Volunteer Management Program.

The driving records of all volunteers who drive for your organization should be reviewed annually.

Record Keeping

Secure storage of volunteer records is an integral component of risk management. Such records include job descriptions, application forms, interview notes, formal background screening reports, reference letters and conversation notes, as well as contact information. Should allegations of misconduct occur against a current or past volunteer, your organization

will be able to demonstrate that all necessary and appropriate steps were taken to screen the individual. These records should be stored indefinitely. Electronic data storage is an effective and affordable option while physical files may be stored off-site through a third-party facility.

Conclusion

Volunteers make an enormous contribution to the well being of our communities. Many organizations and institutions could not realize their goals without the hard work and dedication of their volunteers. Indeed, during these difficult economic times, increased volunteer involvement is seen by many non-profits as the only way to continue to deliver effective client services.

Whatever the size or nature of your organization, a Volunteer Management Program can help you recruit the best volunteers for the job and create a rewarding experience that will help retain volunteers and attract new ones.

A successful Volunteer Management Program should include an informed, thoughtful and systematic risk management component. Risk management not only reduces potential liabilities and reputational harm, it also demonstrates your organization's desire to create a safe environment and protect the wellbeing of your volunteers, staff and service recipients.

References

- ¹ Volunteering in Canada (Government of Canada)
- ² The Canadian Code for Volunteer Involvement, Volunteer Canada, 2006
- ³ Institute for Work and Health: <http://www.iwh.on.ca>

Resources

Public Safety Canada: <http://www.publicsafety.gc.ca>
RCMP: <http://www.rcmp-grc.gc.ca>
Imagine Canada: www.imaginecanada.ca
Insurance Bureau of Canada: <http://www.abc.ca>
Non Profit Risk Management Centre: www.nonprofitrisk.org
The Center for Association Leadership: www.asaecenter.org

ABOUT ECCLESIASTICAL INSURANCE

Ecclesiastical Insurance Office plc is a specialist commercial insurance company. We are deeply committed to protecting the needs of organizations that enrich the lives of others; to preserving Canada's distinct communities, cultures and history; and to supporting initiatives that help improve the lives of people in need.



Proudly part of the Benefact Group - specialist financial services companies built to make a difference.

This advice or information is provided in good faith and is based upon our understanding of current law and practice. Neither Ecclesiastical Insurance Office plc nor its subsidiaries accepts any liability whatsoever for any errors or omissions which may result in injury, loss or damage, including consequential or financial loss. It is the responsibility of the Insured or any other person to ensure that they comply with their statutory obligations and any interpretation or implementation of the above is at the sole discretion of the Insured or other party who may read these notes.

ecclesiastical.ca | [@EIOCanada](https://twitter.com/EIOCanada)

