

# Insider Secrets to Successful Volunteer Management



**IF VOLUNTEERS ARE THE LIFEBLOOD OF A NONPROFIT ORGANIZATION,** volunteer managers are the heart that keeps them flowing in an effective, organized manner. This pivotal role provides value to the volunteers, organization, and the community. But it is not without its challenges. Volunteers can be sparse, those who do volunteer may be difficult to motivate and retain, and many roles are inherently risky.

Volunteer positions range from theater ushers to board directors. However, regardless of the role, there are more risks associated with each position than you may realize. For example:

- **Volunteer Accidentally Drops Woman:** A woman competing in an extreme, obstacle-based race sued the organization after a volunteer trying to help her cross the monkey bars dropped her, leaving her paralyzed.<sup>1</sup>
- **Volunteer Commits Sexual Abuse:** In an unfortunate amount of cases, volunteers—and by association, the organizations for which they work—are sued by abuse victims or alleged victims.<sup>2,3</sup>
- **Board of Directors' Oversight:** A nonprofit is sued by a group of its members because the directors and officers failed to extend the rent-free lease of a space used by many community groups and clubs.<sup>4</sup>



So how can volunteer managers recruit and retain the best people as well as protect them from risks? Sandra Thomson—an expert in non-profit organizations who works in collaboration with Shaw Sabey & Associates Ltd.—asserts that the answer is two-fold: First, know your volunteers' interests, needs and values and match them to their role accordingly. Second, have the proper insurance and risk prevention programs in place to keep the volunteers and organization protected and prosperous.

Written in collaboration with experts Sandra Thomson and Jeffrey McCann, Vice President of Digital Strategy at Shaw Sabey & Associates Ltd., this white paper will explain the reasons why individuals volunteer, the strategies volunteer managers can use to recruit and retain their unpaid workers, and the insurance nonprofits should consider to protect volunteers and themselves.

<sup>1</sup><http://www.nydailynews.com/news/national/n-woman-paralyzed-spartan-race-accident-sues-negligence-article-12648441>

<sup>2</sup><http://wtop.com/prince-georges-county/2016/02/lawsuit-red-flags-raised-about-volunteer-aides-behavior/>

<sup>3</sup><http://www.kansascity.com/news/local/article82716232.html>

<sup>4</sup><http://www.sparkinsurance.ca/#/nonprofit-insurance-claims-scenarios/fxetz>

## Table of Contents

---

### **Part One:**

The Importance of Volunteers' Benefits

---

### **Part Two:**

Six Steps to a Strategic Volunteer Management Strategy

---

### **Part Three:**

How to Protect Volunteers and your Organization



#### **About Sandra Thomson**

Sandra Thomson is an experienced workshop leader and development consultant who has worked with a wide range of nonprofit organizations throughout British Columbia. She worked in the performing arts industry for more than 30 years, specializing in marketing, fundraising, strategic planning, volunteer management and organizational development.

She was president of the Canadian Arts Presenters Association (CAPACOA), president of the Mount Benson Seniors Housing Society and treasurer of the Made in BC Dance On Tour Society. In April 2011, Thomson received the BC Touring Council's Performing Arts Touring Award of Excellence. In May 2011, Thomson received the City of Nanaimo's Honor in Culture Award. She currently serves on the Board of Arts Consultants Canada Associates.



#### **About Jeffrey McCann**

Jeffrey McCann is the Vice President of Digital Strategy at Shaw Sabey & Associates Ltd. Named as one of Canadian Insurance Top Broker magazine's top 10 brokers under the age of 40, McCann has been with Shaw Sabey & Associates Ltd. since 2014.

## Part One:

# THE IMPORTANCE OF VOLUNTEERS' BENEFITS

Most people volunteer their time, efforts, and talents because they receive an emotional or functional benefit from doing so. Emotional benefits are motivators or principles about which people feel strongly, like the feeling of belonging, pride, or love. Functional benefits are requirements that a person needs or wants, like fulfilling a number of volunteer credit hours for a college course.

These benefits are often a person's incentive for volunteering. And, if the benefits do not meet expectations or diminish over time, they can be the impetus for leaving the role.

## Emotional Benefits

Some volunteers donate their time and efforts because of an innate, guiding motivator or principle. Your organization's mission could be strongly aligned with an individual's passion, like saving wildlife. Or, the volunteer position itself could provide the emotional benefit, like feeling valued for putting skills to use for the greater good of your community.

Emotional benefits come from a place that does not go away—a person's values often remain the same throughout their lifetime. Because of this, if you give the volunteer a position that promotes emotional benefits, you have the opportunity to form a long-term partnership with that person.

**Volunteers receive emotional benefits for many reasons.**

**Here are a few examples:**



Scenarios that Elicit Emotional Benefit	Emotional Benefit
Being in a prominent position on a board of directors, doing work that aligns with values	Pride
Taking care of the sick; rehabilitating nature	Love (of people, nature, or other)
Aligning with the nonprofit's mission; giving back to the community	Purpose
Feeling needed in any position; providing a service for others	Valued
Being a part of something bigger; belonging to a group of like-minded people or community	Affiliation

## Functional Benefits

While emotional benefits come from within a person, functional benefits derive from external factors. Functional benefits are often the result of fulfilling requirements, like receiving a specific type of experience for the next stage of career growth. Volunteers who give their time and efforts for functional benefits can be just as helpful and driven as those volunteering for emotional benefits. However, these reasons may make volunteers prone to shorter work terms as their benefits could expire after a certain amount of time.

### Situations that promote functional benefits include:

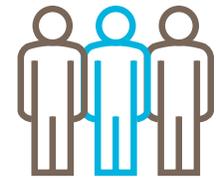
Scenarios that Elicit Functional Benefit	Functional Benefit
Needing résumé experience to take the next step in career growth	Career
Fulfilling requirements for a class	School
Volunteering to pardon a misdemeanor	Service
Acquiring volunteer hours for clubs like 4H, Boy Scouts, and Girl Scouts	Clubs
Expanding personal connections to achieve career or social goal	Network

## Volunteers Leave Due to Lack of Benefits

Just as people continue to volunteer due to functional or emotional benefits, many times they will leave the position if the benefits do not match their needs or no longer exist. For example, if individuals volunteer because they want to be part of a community and develop relationships, they need to be in positions that enable them to interact with people. If they become isolated during their tenure in the position, their ability to garner relationships evaporates along with their emotional benefits. Similarly, if a person volunteers because of a functional benefit like fulfilling a college credit, he or she may leave once they acquire the credit.

Regardless of whether a volunteer is driven by emotional or functional benefits, volunteer managers that shape the experience to their staff's desires will be more successful than those who do not. As a thought-starter for volunteer management and retention strategies, Thomson recommends answering the following questions:

- What are the expectations (theirs and ours) and how can we meet them?
- What kind of climate or setting can we create that would prove enjoyable for a volunteer?
- With what people might they work and are those people interesting and enjoyable?
- Do we promote opportunities for interactions with others?
- Do we have our own systems or do we expect the volunteers to come up with their own?
- Do we provide the volunteers with the resources they need to do the job?



“Even if you manage the volunteer properly and provide the benefits requested, **one out of every three volunteers in any given year do not volunteer again the next year. Don't expect everyone to stay on.**” – Sandra Thomson

## Part Two:

# SIX STEPS TO A STRATEGIC VOLUNTEER MANAGEMENT STRATEGY

**THE IMPORTANCE OF RECRUITING, MANAGING, AND RETAINING** the right volunteers can't be over-stated. Long-term volunteers hold organizational knowledge, require less training, and are better advocates for your organization than those that just pass through.

To acquire and keep the best, Thomson recommends using volunteers' values and benefits in each step of your management approach. Her six-step strategy for the most effective volunteer management follows:

## 1. Create Job Description

A job description outlines the details of the job at hand. It is also a good place to offer a teaser of the benefits volunteers may receive.

"Many organizations are not specific enough in their job descriptions, neglecting information like time requirements, phone number to call for more information, job duties, and other important details," Thomson said. "The best job descriptions contain specific information, the next steps for getting involved, and connect with as well as influence the intended audience."

To be as effective as possible, job descriptions must answer the basic questions and use benefit-oriented language.

### Answer the Fundamental Questions

Start your job description by answering the following questions:

<b>Who</b>	is your organization? For whom is your organization looking?
<b>What</b>	is the position? are the skills needed to fulfill the job?
<b>Where</b>	does the job take place?
<b>When</b>	does the position start and end?
<b>Why</b>	does your organization need volunteers for this job? should the volunteer be interested?
<b>How</b>	will the volunteer successfully accomplish the job? should the volunteer apply?



## Use Benefit-Oriented Language

You can tailor the answers to the questions above based on the benefits of the audience you are targeting. For example, if you are trying to recruit students, see how the answers to a few of the questions below are tailored to them using specific, benefit-oriented language:

<b>Why should you be interested?</b>	This position fulfills six credit hours required to graduate.
<b>For whom are we looking?</b>	We are looking for students who want a flexible role that contributes to bettering their community.
<b>When does the position start and end?</b>	The position spans the entirety of the spring quarter (March 28 through June 3).

As an additional example, if the position requires an extroverted people-person, turn this requirement into a benefit. Point out that the position offers the opportunity to create relationships and interact with people—many extroverts consider this a benefit that they seek in a volunteer position.

## 2. Recruit

Once you've created your job posting, put it to work in the places your audience is most likely to find it. There are many channels you can use to spread the word, including the following:

- **Online:** Keep your website, social platforms, email, newsletters, and online volunteer or job boards updated.
- **Word of mouth:** Your best advocates may be existing volunteers or staff. Keep them aware of vacant positions so they can spread the word through their network.
- **Onsite:** Post information around your organization's facilities. Create a volunteer bulletin board for regular updates and requests.
- **Media:** Local television and radio may provide free air-time for nonprofits. Provide them with a blurb if they have time to mention your organization.
- **Community locations:** Post flyers at local hotspots like libraries, churches, coffee shops, campuses, or other locations your audience may see.
- **Volunteer week:** Many college campuses, retirement homes, and businesses have a volunteer week or similar initiative. Reach out to find opportunities.
- **Company presentations:** Network with local companies that have a culture of giving back to the community. Provide them with updates and presentations as positions arise.

## 3. Screen

Meet your applicants in person to determine if they have the proper skills, experience, and temperament to fulfill your organization's needs. You may need to screen for basic requirements like passing a background check or holding a valid driver's license. Depending on the position, you may also screen for hard skills, like a technical understanding of the subject matter, or soft skills, like being a savvy communicator or friendly.

“Recruiting is like marketing—the most important person to consider is your future volunteer. Get inside of this person's head and determine where they prefer to receive information. **Wherever that is, make sure information about the position is there.**”

– Sandra Thomson



“All volunteer assignments should be assessed for level of risk,” says Thomson. “The higher risk the position, the more in-depth the screening procedures required.”

During screening, you can also assess the volunteer’s intentions for applying to the position—determine if they are seeking emotional or functional benefits.

Thomson notes: “A volunteer’s intentions are extremely important in placing them correctly in your organization. You want to align their skills so they receive the benefits they seek. Doing so has a higher likelihood of retaining that person for a longer duration.”

---

#### 4. Orient and Train

Orientation is your volunteers’ first glimpse into what drives your organization. It introduces them to your culture, goals, history, policies, and location. Once you orient your volunteers to the basics of your organization, job-specific training can begin.

Regardless of the methods you use to train and orient your volunteer—be it a multimedia presentation or a luncheon—you can use these opportunities to emphasize their benefits. For example, if a new volunteer expresses an interest in belonging to a community and building relationships, create a training event that will introduce them to their new network. Use that time to build connections between your new volunteer and others—they’re more likely to find the experience valuable.

---

#### 5. Manage

Like paid employees, volunteers need a supervisor. This person should always be the same contact, and somebody to whom the volunteer can go for answers. Through regular check-ins, the supervisor can do their best to ensure the volunteer is receiving the benefits that they desire and is performing the role up to the organization’s standards.

If a volunteer is not performing in the manner sought by the organization, supervisors can also correct, discipline, or fire them, if needed. During orientation, volunteers should be aware of the discipline policy, so if the supervisor has to enact disciplinary actions, the volunteer won’t be surprised.

---

#### 6. Appreciate

The final step for effective volunteer management and retention is appreciation—think of it as the currency with which you pay your volunteers. Part of knowing how to pay your staff is understanding what benefits they enjoy receiving from your organization. Develop an appreciation strategy that incorporates the things that matter most to them. This may require setting aside a small budget, so plan ahead to acquire funds if possible.

There are numerous examples of creative and effective appreciation methods, including:

**Thank you:** Say it often and write it down in a personalized note. This simple and free method of appreciation is a time-tested way of making sure your volunteers know you value their efforts.



**Events:** A monthly, quarterly, or yearly event is something to which staff and volunteers look forward. Not only do events allow you to thank and recognize your volunteers, they also help create a stronger community of workers.

**Acknowledgement:** Many people like being publically recognized for their work. Create a volunteer of the week board or post their efforts online. This type of acknowledgement will let that person—and everyone else—know you value them. Track the hours worked by every volunteer and reward milestones reached by individuals or teams.

**Gifts:** Little acknowledgements mean a lot. Even something small like a five dollar \$5 coffee gift card, vase of flowers, or candy can convey your appreciation.

Whatever method or combination of methods you choose, here are a few best practices for making the most out of your appreciation efforts:

Tailor the awards to each volunteer—not everyone wants to be publically thanked or have their picture taken.

Be clear and honest about why you are thanking the person—list specifics and how they have helped.

Provide rewards regularly and in a timely manner to when the outstanding work occurred.



“Volunteers provide free labor, but should not be free of charge to the organization. Savvy nonprofits set aside a fund for anything from t-shirts to a yearly luncheon. Small awards and rewards demonstrate that your organization values its volunteers—and that is money well spent when it comes to retention.”

– Sandra Thomson

## Part Three:

# HOW TO PROTECT VOLUNTEERS AND YOUR ORGANIZATION

**AN ADDITIONAL CONSIDERATION FOR SUCCESSFUL VOLUNTEER** management and retention is protecting your volunteer staff should an accident or lawsuit occur. A pervasive mentality among nonprofits contends that because there is often less money and fewer stakeholders involved in nonprofit work than for-profit work, there is less risk. As a result, they fail to see the importance of insurance. This is a mistake. Nonprofits are surrounded by potential risks, especially with regard to their volunteer staff. It is your job, as the manager of a responsible nonprofit organization, to prepare for the most likely incidents that could occur.

“Insurance for volunteers should be in place prior to writing a job description—even if that position is for something as non-threatening as a theater usher,” said Thomson.

In addition to general liability insurance, there are two specific types of coverage that are especially relevant for the organization protecting itself from risks associated with volunteers: directors and officers (D&O) liability and volunteer injury insurance.

### **Directors and Officers (D&O) Liability**

D&O liability for nonprofit organizations is designed to avoid personal risk by protecting volunteers and your organization in the event of a lawsuit. When volunteers give their time and energy to a nonprofit organization, you want to be sure they're not risking their personal financial security to do so.

### **Volunteer Injury Insurance**

In the event of an accident, volunteer injury insurance will provide your volunteers with medical, catastrophic injury, and wage loss benefits. It can also help your organization avoid potential lawsuits if a volunteer is seriously injured.

“Don’t forget that volunteers who are directors and officers sitting on a nonprofit board are personally liable for financial losses if the nonprofit doesn’t carry a directors and officers insurance policy. Anyone considering or holding a position on an NPO board should ask to see that there is a D&O policy in force to ensure that they and their personal assets are protected.”

*-Jeffrey McCann, Vice President,  
Digital Strategy, Shaw Sabey  
and Associates Ltd.*

## Are Your Volunteers Covered?

According to Jeffrey McCann, a common question he receives as a vice president at Shaw Sabey is: Are my volunteers covered? To this, he asserts:

There are a couple of answers. One is to make sure you have the proper policies in place such as D&O or general liability, and that volunteers are included in the definition of an insured in the nonprofit's liability coverage, in the event they are named in a lawsuit for their role within the organization. This is especially important if volunteers are serving alcohol at events like a fundraiser. You can find the definition of an insured in the policy wording. The trigger for claims on these policies is a lawsuit.

The other part to this is volunteer accident coverage. This responds if a volunteer is injured while working for the nonprofit. The policy will pay out depending on the severity of the injury. This is a no-fault claim, so there doesn't have to be a lawsuit for the policy to respond. It's just a good way to take care of volunteers if the worst should happen and they aren't able to return to work.

It can be difficult to determine if your nonprofit is covered against all exposures—especially if you aren't aware of the pervasive risks involved with utilizing volunteers. To help understand the breadth of exposures that apply, read the claim scenarios below.

### Claim Scenarios

Nonprofit organizations are involved in situations that could require insurance more often than they may realize. To illustrate these scenarios, read the following. In all cases below, the D&O policies covered court defense costs and out-of-court settlements, in some cases saving the organizations hundreds of thousands of dollars. The volunteer injury insurance policies covered the medical bills and, in some cases, paid weekly amounts for those whose injuries prevented them from returning to their paying jobs.

#### Directors and Officers (D&O) Liability Cases

**Sexual Harassment:** The board of a nonprofit community radio station, in addition to the person accused of harassment, was sued for not effectively protecting volunteers and staff from harassment.

The claim of board negligence included the absence of a formal sexual harassment policy and zero tolerance standards. Further, there was no training or processes in place to deal with harassment and discrimination.

**Event Safety Planning:** A nonprofit was sued by a spectator at a holiday parade after one of the organization's volunteer performers tossed a free gift into the crowd, injuring the plaintiff. The plaintiff claimed inadequate safety protocol and training procedures and sued for financial damages.

Though the bodily injury damages were covered by the nonprofit's commercial general liability, the D&O policy was needed to pay for the defense costs and the out-of-court settlement.

## Volunteer Injury Policy Cases

**Chaperone Injury:** A volunteer accompanied a youth group on a skiing trip. While skiing, she fell and injured her arm, which prevented her from returning to her work. The volunteer injury policy paid a weekly amount to her while she was off work.

**Stage-building Injury:** A volunteer was working on the set of a community theater production. While building the set, a piece of wood slipped and hit him in the face, breaking his jaw. The volunteer was paid by the insurance policy as a result of his injuries.

## In Summary

Long-lasting volunteer partnerships are mutually beneficial. Volunteer managers can make the experience the best it can be for both parties by understanding a volunteer's benefits and protecting them with insurance. It is a combination of all efforts that creates the most effective volunteer management strategy.

"Everything you do as a volunteer manager is either an invitation for the volunteer to stay or an invitation to go," reiterated Thomson.



[assurexglobal.com](http://assurexglobal.com)

Founded in 1954, Assurex Global is an exclusive Partnership of the most prominent independent agents and brokers in the world. With \$28 billion in annual premium volume and more than 600 Partner offices, Assurex Global is the world's largest privately held commercial insurance, risk management and employee benefits brokerage group. An international insurance powerhouse, the Partnership combines the local expertise and global reach of international brokers on six continents.