

The
Communiqué

... a technical reference bulletin by the Risk Control
Services Department of the Glatfelter Insurance Group

Volunteer Services

Volunteers perform an important and necessary service for hospice programs and other community based organizations. However, they can also represent a substantial exposure. When you allow volunteers to act on your organization's behalf, any injury to a patient or damage to property stemming from the actions of the volunteer could result in a claim against the organization.

Because of this risk exposure, it is important that organizations utilizing volunteers establish comprehensive policies and procedures for volunteer selection, orientation/training, supervision/monitoring, and ongoing evaluation. The National Hospice and Palliative Care Organization (NHPCO) has published several guidelines that address these issues. These guidelines provide a good reference for evaluating your organization's volunteer program.

Recruiting and Selection of Volunteers

While many organizations depend on volunteers to support their mission and the provision of services, this does not mean that you should accept all those who indicate they have an interest in volunteering. There should be a screening process in place. A formal application should be required. The application can be accompanied by a cover letter that describes the qualifications, time commitments and any special requirements of the position. This may serve to deter casual applicants who are not prepared to meet your requirements for service and training. In other words, treat the volunteer as if they were going to be an employee.

A face to face interview should be conducted. During the interview you should provide a brief overview of the organization and the expectations of volunteers. Personal references should be required, and those individuals need to be contacted. The volunteer file should include documentation of notes from the interview and the results from the reference checks.

There should be written job descriptions for all positions staffed by volunteers. Performance criteria should be defined. When the qualifications for a position are well defined, an applicant can be more easily rejected for failing to meet minimum qualifications. For example, an organization can advise an applicant that his or her skills and/or experience do not match those required for the position. There is no obligation to accept each and every candidate or to state a reason for rejection.

This is a sample guideline furnished to you by Hospice and Community Care Insurance Services. Your organization should review this guideline and make the necessary modifications to meet your organization's needs. The intent of this guideline is to assist you in reducing exposure to the risk of injury, harm, or damage to personnel, property, and the general public. For additional information on this topic, contact your Hospice and Community Care Insurance Services Representative at (800) 233-1957.



Orientation/Training

NHPCO Standard HR 7.2 addresses the minimum requirements for training of hospice volunteers. Orientation of volunteers in a community based program should be almost as comprehensive as that provided to new employees. Some of the issues that should be addressed in any volunteer orientation program include:

- The role of the volunteer
- Roles of the various team members with whom the volunteer will interact
- Communication skills
- Patient and family rights and responsibilities
- Infection Control practices
- Professional boundaries and patient/family boundaries
- Safety Issues
- Confidentiality
- Reporting requirements related to patient changes, pain or other symptoms

It is also important that volunteers be included in ongoing educational and training programs. Sometimes it is difficult to provide continuing education sessions that fit the schedule of every volunteer. It is important to identify which sessions are mandatory and must be attended by everyone. Consideration should be given to providing on line and audiovisual training opportunities that can be more easily accessed. Policy and procedure updates and reminders can be provided via a volunteer newsletter.

Supervision/Monitoring

NHPCO Standard HR 9 states that “adequate supervision and professional consultation by qualified personnel is available to staff **and volunteers** during all hours.” This standard should be followed by any organization that uses volunteers, not just hospice programs. It is important that both the volunteer and the employed staff understand their responsibilities in this area. There may be an employed volunteer coordinator or a Director of Volunteers, but most often it is other team members who are directly supervising and monitoring the volunteer’s activities and interactions with patients and family members on a day to day basis. Written policy should indicate the title of the person to whom the volunteers report, as well as procedures for mentoring and dealing with problems.

Ongoing Evaluation

NHPCO Standard HR 7.4 states “volunteers are evaluated at least annually using the performance criteria defined in the job description.” Annual evaluation of volunteers is a common loss control recommendation during our on site risk assessments. This is definitely a weak area for a lot of organizations. Many organizations feel the task is too difficult because of the number of volunteers and their varied work schedules. But these very same conditions make annual evaluation even more important. A poor performing volunteer can create as much risk exposure for an organization as an employee. Evaluations should include input from team members who directly observe the volunteer during care assignments. Patient/family satisfaction surveys are often a good source of information on volunteer performance also.



Special Risks

Teen Volunteers – Volunteering provides young people with opportunities to explore career fields and engage in community service. Minors should not be permitted to volunteer unless they have written parental consent. Many organizations include a parent or guardian in the interview process. It is important that they understand the position requirements prior to giving their consent.

Professional Volunteers – Some organizations have professionals who volunteer their services. This might include barbers/beauticians, nurses, massage therapists, etc. When utilizing a volunteer in a professional capacity, it is important that you maintain documentation similar to what you would maintain for an employee. This would include verification of any required certification or license and evidence of current malpractice insurance coverage.

Auto Liability – Volunteers in community based programs, such as hospice, spend a lot of time driving their own vehicles in the course of their role as a volunteer. It is important that the organization verifies that the volunteer has a current, valid drivers' license and adequate auto insurance coverage as part of the initial screening process. Motor vehicle record checks should be done initially and then every year thereafter. Volunteers who may be transporting patients or their families in their vehicle should have liability coverage of at least \$100,000.

Abuse Prevention – Unfortunately many individuals who are looking for an opportunity to take advantage of a vulnerable adult or child enter the organization through a volunteer position. When volunteers are placed in direct contact with at-risk clients, thorough screening procedures, including criminal background checks, should be instituted.

Summary

Risk management and liability reduction are important considerations when working with volunteers. A risk management assessment is necessary because it helps protect everyone involved (the organization, volunteers, clients, etc.) Hospice, home care, and other community based organizations need to carefully evaluate their volunteer programs to assure that they are adequately managing the risk.

