



# Volunteer Management Insurance Guidelines



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## INTRODUCTION

The history of the Catholic Church is built on people volunteering their time and talent. Volunteers are vital to the success of parish ministries and to our catholic schools.

### **What is a Volunteer Coordinator?**

A volunteer coordinator could be an employee or volunteer. They are responsible for overseeing the selection of volunteers, assignment of duties, orientation and training, and the designation of select individuals to supervise the volunteers.

This guide has been developed to support your work as the Volunteer Coordinator. We appreciate your willingness to take on this role. Please feel free to contact Loss Control & Prevention [Lavoun@dsj.org](mailto:Lavoun@dsj.org) if you need further assistance or have additional questions.

### **Definition of a Volunteer**

Merriam-Webster dictionary defines a volunteer as “a person who voluntarily undertakes or expresses a willingness to undertake a service.”

A volunteer is a valued part of the church. The volunteer should be at least 18 years of age. If under 18, the volunteer should be accompanied by a parent or have been given permission by the parent to perform volunteer activities while supervised by another adult.

Every volunteer should go through a screening process which will be covered within this handbook. A volunteer is not someone who is compensated for their service or under contract for their service. A volunteer is also not an employee functioning under their job description.



### **Selection, Screening and Assignment of Duties**

Ideally, a volunteer position description should be created for each potential volunteer activity. This description should outline the tasks the volunteer will be expected to perform, the skills or qualities a volunteer should possess to perform their task, and any orientation or training that the parish can provide. Sample volunteer position descriptions can be found in *Appendix A*.

All volunteers should be required to complete a Volunteer Application, *Appendix B*. This sample application form asks the volunteer to provide references. It is highly recommended to check references. Each long-term volunteer should be interviewed as part of the application process. Please do your best to utilize volunteers that are the appropriate age and have the skills necessary to perform the tasks/duties they are being asked to do. Although not recommended, if a volunteer is asked to perform a task such as plumbing, electrical or roof work, the volunteer should be licensed. It is okay not to accept a volunteer for a certain position or at all in order to limit risk. A sample Volunteer Interview Form can be found in *Appendix C*.

All volunteers are required to comply with Diocesan policy on Safe Environment. Any volunteer that will be working with children or vulnerable adults should have the required clearances prior to their start date. Please contact Anthony Gonzalez, Director of OPCVA for the required paperwork at [adgonzalez@dsj.org](mailto:adgonzalez@dsj.org), by phone at 408-983.0113 or visit our Diocese of San Jose [website](#)

For those individuals that will be involved in fidelity (money handling) positions such as counting collections, working with scrip, etc. See section "Money and/or Scrip Handling" for materials that pertain to fidelity controls.

Adequate records need to be kept on the selection, screening and assignment of duties for each volunteer. We recommend maintaining these records for a period of three (3) years.

Limit the issuance of facility keys to volunteers. It is recommended to maintain a record of all keys that have been issued. If you should need guidance or have further questions please contact Ian Abell, Director of Facilities and Risk Management [iabell@dsj.org](mailto:iabell@dsj.org) or 408.983.0223. Find sample Key Schedule *Appendix D*.



### **Orientation and Training**

This needs to be reviewed and provided as appropriate for each and every volunteer. Never assume someone is qualified. Orientation for new volunteers is only part of the training process as volunteers also need continuing education as they perform their duties.

Each volunteer should be properly trained in the proper use of any equipment or tools needed to perform the task. The equipment (parish, school or otherwise) should be inspected to determine that it is in safe operating condition and equipped with all applicable safety requirements. If there is any doubt, do not allow to be used. The parish/school should be responsible to provide any personal protective equipment for volunteers, as needed. Examples would be gloves, safety glasses, goggles, or a respirator.

Never allow a volunteer to provide any homemade equipment. Examples would include homemade scaffolds, ladders, and grills, cooking equipment, and playground or carnival ride type equipment.

No one can be allowed to volunteer without being screened and granted permission. For minors, permission form from parents/guardians is required. See Child Volunteer Waiver, *Appendix E*.

Volunteer activities and projects require an Adult Volunteer Waiver Form to be signed by the volunteer. See Adult Volunteer Waiver, *Appendix F*.

### **Supervision & Support**

Volunteers need to have someone in command, so they know who to ask for guidance. Before any project or activity begins, supervisory staff or designated adult supervisors must be present to oversee the work. This is especially important when any minors are participating. Support for the volunteers should also be provided by designating someone they can go to with problems that arise from their volunteer work.

Choose supervisors wisely. Ensure they have the ability, temperament and are given the direction to ensure volunteers are used in a safe and effective manner.



### **Injury/Emergency Procedures**

It is important to know what to do if a volunteer is injured as well as know what to do in case of an emergency. First aid equipment should be accessible in areas used by volunteers. A telephone or other means to contact emergency responders should be available.

Volunteers should know who to call at the parish in case of an emergency or injury. If an emergency occurs, an Internal Incident Report Form should be completed, *Appendix G*.

The Diocese of San Jose carries secondary volunteer insurance with Philadelphia. This policy covers **only out of pocket medical expenses** incurred as a result of the injury. The injured party works directly with Philadelphia Insurance on their claim. See *Appendix H*

Be prepared to cancel any projects that take place outside in case of inclement weather such as lightning, strong winds, etc.

### **Routine Evaluations**

With all volunteers, you should consider doing a routine review of the volunteer's performance. This could help in determining whether you feel the volunteer should be used again in the same capacity.

The Post Activity Review Form could be used to conduct such an evaluation, *Appendix I*.



## **Guidelines for Common Volunteer Activities**

### **Construction, Assembly Activities**

Volunteers are not to be allowed on roofs, scaffolds or ladders and prohibited from operating power tools, (i.e. drills, saws, etc.). Use of scaffolding equipment and ladders can create serious injury and liability exposures for the Catholic Church. These exposures increase significantly when equipment is in poor condition or used improperly. The risk is too great to justify the action.

Transfer the risk by hiring a qualified company to perform complex repair or renovation projects, especially those that require the use of scaffolding equipment. Always remember to obtain a Certificate of Insurance naming the Roman Catholic Bishop of San Jose and the location as additional insured's. See Vendor Insurance Requirements, *Appendix J*.

Be aware of any projects involving heavy items needing to be lifted or moved. Parish/School must ensure the volunteer is of the appropriate age and physically fit to perform such work.

It is important to ensure the name of the volunteer performing the task is recorded in your volunteer log.

Following these recommendations will improve worker safety and prevent accidents... Please contact Loss Control & Prevention [Lavoun@dsj.org](mailto:Lavoun@dsj.org) if you need additional information.

### **Lawn Care Activities**

Volunteers may not operate electric mowers and/or trimmers at any time while volunteering for the parish/school. Volunteers may not handle pesticides or poisonings.

Safety goggles/glasses must be worn any time the volunteer is using a leaf blower, etc.

### **Home Health Care Activities**

Volunteers should not perform any medical tests, medical evaluations/diagnosis or dispense medicine these activities are prohibited while on volunteer time.



### Money and/or Scrip Handling – Counting of Collections

[Financial Policy Manual](#) has been established and should be followed when volunteers work with money. Please use the link provided to review the Diocese of San Jose Financial Control Guidelines. If you have any further questions please contact Brian Mooney, Chief Financial Officer 408.983.0168.

### Driving and Transportation Activities

The Volunteer Driver must be a minimum of 21 years of age, to drive themselves, and not have any impairment which could prohibit safely driving the vehicle. If the volunteer will be responsible for transporting other individuals, the minimum age is 25.

Volunteer drivers must complete the Volunteer Drivers Form, *Appendix K*. For frequent drivers, a Motor Vehicle Record check (MVR) is recommended.

Volunteers using their own vehicle must maintain minimum liability coverage on their vehicle of 100,000/300,000/50,000. The volunteer should be informed in advance that their insurance would be primary if an accident occurred.

Any volunteer that has indicated on the Volunteer Drivers Form having three or more moving violations or accidents within the last three years should be required to take a Defensive Driving Course before being allowed to drive.

Volunteer drivers should also complete the Volunteer Driver Acknowledgement Form, *Appendix L*.

Towing or attaching trailers or flatbeds to a vehicle is not allowed.

Field trips and youth group trips --Contracting with a bus company is recommended. Absolutely no 11-15 passenger vans are allowed to be used. For private passenger vehicles our when available on other vehicles, everyone must wear a seatbelt. Car seats and booster seats should be used to meet your state law requirements. Maximum driving duration is 8 hours with regular breaks being taken. Always be aware of the risk of fatigue.

Volunteers driving on behalf of the parish need to be safe and courteous drivers. At no time should a cell phone be used while operating a motor vehicle this includes hands free devices. These devices should only be used when the driver has pulled off the road and is safely parked.

Volunteer should only be allowed to drive for tasks specifically targeted toward their volunteer activity.





**Food Service – Volunteer Food Preparation Activities**

Volunteers designated to prepare or serve food should follow Proper Food Handling Guidelines, *Appendix M*.

**Housekeeping/Cleaning Volunteer Activities**

Volunteers should not use scaffolds or ladders for cleaning projects. Only trained individuals can operate industrial/propane operated cleaning equipment. Please provide volunteers with PPE Personal Protective Equipment.

**Festival Volunteer Activities**

Do not allow volunteers to bring in any homemade grills or barbeque equipment. Only trained employees should light pilot lights for kitchen stoves and ovens. Always keep temporary external cooking equipment a safe distance from buildings. Volunteers should be instructed to monitor floors and walkways for spills or other debris. For updated Festival Guidelines and contracts please contact Loss Control & Prevention [Lavoun@dsj.org](mailto:Lavoun@dsj.org) or 408.983.0237.