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**VOLUNTEER MANAGEMENT  
MANUAL**

**April 2019**

*With thanks to the*



## **Acknowledgements**

We would like to thank the following individuals and groups who made significant contributions toward the content of this manual in 2012.

Many thanks to the Volunteer Action Centre of Kitchener-Waterloo and Area who generously welcomed enhancement and updating of the Volunteer Administration manual they created with a grant from the Kitchener and Waterloo Community Foundation.

Our heartfelt appreciation to Chris Jarvis of Realized Worth for allowing us to include the Three Stages of the Volunteer (<http://www.realizedworth.com/2012/05/3-stages-of-volunteer-what-they-need.html>) in the Recruitment section. Thanks also to Chris for taking the time to review and make recommendations for clarity in the text.

Thank you to Sergeant Pam Burke of the London Police Service for allowing us to adapt material on Police Checks that she presented at a London and Area Association for Volunteer Management (LAVA) meeting and for taking the time to review the text for accuracy.

Many other contributors are cited throughout the manual and we thank them for their work in establishing and enhancing the growing body of knowledge and resources that today make volunteer management a vital and dynamic profession.

Thank you to Michelle Baldwin who spearheaded the project, Mindy Gordon for help with editing and formatting, and members of the Executive of the London and Area Association for Volunteer Administration (LAVA) for taking time out of their very busy schedules to review the final manuscript and provide invaluable input.

Every worthwhile project needs a champion and ours was Lee Jones who contributed content, managed the project and kept it on track.

In March 2019 Jordan Brennan took on the challenge of reviewing and updating the content of this manual to reflect the changes that occurred with the Ontario Police Record Checks Reform Act in 2018, and the Canadian Code for Volunteer Involvement in 2017.

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## Volunteer Management Overview

Volunteer Management is a vital and dynamic component in the growth and impact of volunteerism today. As the recognition of the fundamental nature and importance of volunteerism grows, so too does the significance of the role of the Volunteer Manager. 2012 marked the release of the inaugural *National Occupational Standards for Managers of Volunteer Resources* by the HR Council for the Nonprofit Sector in Canada.

Volunteer Managers provide the structure necessary for more formalized interaction between those needing assistance and those willing to give it. Volunteer Managers articulate needs, refine these into roles and job descriptions, recruit suitable candidates, manage risk, provide orientation and training, supervise, recognize efforts and assess the impact of volunteers engaged in meeting those needs. In addition to this, when necessary, Volunteer Managers manage the relationship between the volunteer, the organization and the benefactors.

By its very nature, volunteering is done without expectation of remuneration. Most often, volunteers attach themselves to an organization because they either believe in its cause; have a personal connection to the issue or people an organization is built around; or because they feel they have suitable skills or experience to offer an organization as a way of “giving back” to their community. It is true that not all volunteering is purely altruistic. Some individuals volunteer to gain work-related experience. In some cases, volunteering is mandated as community service. Whatever the circumstances, it is the responsibility of the Volunteer Manager to engage the volunteer in the work of the organization.

The environments within which Volunteer Managers do their work vary widely. Some organizations are primarily volunteer-based with very few staff, while others are institutions where volunteers are in the minority. Some organizations are unionized, and others are not. Volunteer Managers may be responsible for hundreds of volunteers across a region, province or the country. Other Volunteer Managers may be responsible for a smaller number of localized volunteers they interact with every day. Work may be focused on service delivery on the front line, or in building organizational infrastructure. Volunteer Managers may work alone, with staff that report to them directly, or with volunteer support. Each environment provides its own sets of challenges and rewards.

Today, the presence of four generations in the work force, the rise of corporate social responsibility, a wide array of technology and social media, and a fragile economy, mean that volunteers and the organizations that host them are looking for new formats, venues, frameworks and time frames for volunteer service. The *Canadian Code for Volunteer Involvement* notes, [“The shifting perceptions of what volunteering is and how Canadians are acting upon their values was illuminated in our study, \*Recognizing Volunteering in 2017\*, carried out in collaboration with IPSOS Public Affairs. People are doing great things inside, alongside and outside of organizations. They are raising funds, raising awareness, mobilizing ideas and mobilizing people to improve lives, communities and society. People today tend to lead more structured lives, are more results-oriented, autonomous, tech-savvy, and have multiple responsibilities and interests. The type of volunteer roles Canadians seek evolves throughout](#)

~~the life cycle to reflect changing priorities and circumstances.”~~ The need for software and Internet based platforms to recruit, communicate, schedule and track volunteers is growing rapidly and requires Volunteer Managers keep their skills up-to-date. Managing a burgeoning youth population and a declining senior population presents unique and interesting challenges. More and more, Volunteer Managers are being asked to provide a clear and comprehensive vision for volunteer programs and the volunteer experience they provide. This comes with the additional opportunity and responsibility of integrating the volunteer component of an organization with its overall vision, mission and strategic plan. Concurrently, this requires refined skills in planning, budgeting, monitoring and reporting. It is hoped this trend, long advocated for by the Canadian Code for Volunteer Involvement, will lead to an enhanced understanding at the senior management level of the key role Volunteer Managers can, and have, played in the overall health and strength of organizations.

Volunteer Managers are charged with the responsibility to design volunteer programs that are inclusive and accessible to all members of their community. The challenge of finding new and innovative ways to include all members of the community in the volunteer experience is rewarded with new and innovative ways to work with clients and provide services to the community.

A wide range of resources are available to help those new to the field of Volunteer Management. Associations for Volunteer Administration (AVAs) exist at the local, provincial and national level. These provide advocacy for the profession, assist in the creation and communication of standards of practice, act as certification bodies, and provide continuing education. Volunteer Canada and Imagine Canada provide a bevy of resources for Volunteer Managers. A variety of post-secondary education programs on volunteer management are also available.

The rewards of volunteer management are many. Volunteering can be a transformative experience for both the individual who serves and the community in which they serve. There is a growing understanding that volunteering is not a relationship where the benefit flows only one way. Beyond the self-evident benefits of learning new skills, trying new things, enhancing and increasing social interactions with peers, there is mounting evidence that volunteering is something more profoundly rewarding. In the words of Madame Flavia Pansieri, Executive Coordinator, United Nations Volunteers, “Doing something for someone else is one of the greatest sources of satisfaction experienced by a human being.” (Volunteer Toronto presentation, March 29, 2012)

The United Nations’ *2011 State of the World’s Volunteerism Report* notes that volunteerism is a universal moral imperative. In first world countries, it impacts individual and societal well-being and provides a platform for social cohesion and inclusiveness. In third world countries, it is vital to the resolution of violent conflict, the building of a caring and democratic society, and sustainable economic growth.

Providing the conditions in which volunteerism can thrive is a deep and rewarding experience. Solid volunteer management contributes to individual and community well-being and increases the capacity and impact of organizations that serve local and global communities.

## A. Canadian Code for Volunteer Involvement

The purpose of the *Canadian Code for Volunteer Involvement* from Volunteer Canada is to provide voluntary organizations with a framework for safe and effective volunteer involvement. Organizations, which depend upon volunteers as critical components of the organization's operations and success, must work to keep their volunteers engaged and supported. The Canadian Code for Volunteer Involvement provides organizations with a base upon which to start the discussion on volunteer involvement. (The following is taken from the 2017<sup>2</sup> CCVI - <https://volunteer.ca/index.php?MenuItemID=346> <http://volunteer.ca/about-volunteerism/canadian-code-volunteer-involvement>.)

### The Value of Volunteer Involvement

Volunteer involvement has a powerful impact on Canadian society, communities, organizations and individuals.

### Volunteer involvement is fundamental to a healthy and democratic society in Canada

- It promotes civic engagement and active participation in shaping the society we want.
- It encourages everyone to play a role and contribute to the quality of life in communities.

### Volunteer involvement is vital for strong and connected communities

- It promotes change and development through the collective efforts of those who know the community best.
- It identifies and supports local strengths and assets to respond to community challenges while strengthening the social fabric.

### Volunteer involvement builds the capacity of organizations

- It provides organizations with the skills, talents and perspectives that are essential to their relevance, vitality and sustainability.
- It increases the capacity of organizations to accomplish their goals through programs and services that respond to and are reflective of the unique characteristics and needs of their communities.

### Volunteer involvement is personal

- It promotes a sense of belonging and general wellbeing.
- It provides the opportunity for individuals to engage according to their personal preferences, interests, skills and motivations.

### Volunteering is about building relationships

- It connects people to the causes they care about, and allows community outcomes and personal goals to be met within a spectrum of engagement.

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- It creates opportunities for non-profit organizations to accomplish their goals by engaging and involving volunteers, and it allows volunteers an opportunity to connect with and contribute to building community.

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### Guiding Principles for Volunteer Involvement

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Guiding principles keep relationships balanced between organizations and their volunteers by ensuring they are reciprocal. They also help to ensure a commitment to developing and supporting volunteer involvement that benefits both the organization and the volunteer(s).

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### Volunteers have rights. Charitable and non-profit organizations recognize that volunteers are a vital human resource and will commit the appropriate infrastructure to support volunteer involvement.

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- The organization's practices ensure effective volunteer involvement.
- The organization provides a safe and supportive environment for volunteers.

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### Volunteers have responsibilities. Volunteers make a commitment and are accountable to the organization.

- Volunteers will act with respect for the cause, the stakeholders, the organization and the community.
- Volunteers carry out their involvement responsibly and with integrity.

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The standards below are intended to provide guidance, not detailed instructions. Each organization will have to consider how to implement the standards according to its circumstance, while achieving the overall intent of the Code. By adopting the standards, the organization demonstrates a commitment to engaging and supporting volunteers in a meaningful and responsible way.

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### Mission-Based Approach

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The Board of Directors and senior staff acknowledge, articulate and support the vital role of volunteers in achieving the organization's purpose or mission. Volunteer roles are clearly linked to the organization's mission.

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### Human Resources

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The organization has an integrated human resources approach that includes paid employees, students and volunteers. Volunteers are welcomed and treated as valued and integral members of the organization's human resources team. Support for volunteer involvement includes providing appropriate resources.

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### Infrastructure for Volunteer Involvement

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The organization adopts a policy framework and administrative procedures that define and support the involvement of volunteers. The organization has the required resources in place and has designated a qualified individual(s) responsible for supporting volunteer involvement. Standardized documentation, records management practices and procedures follow current relevant legislation.

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### Evaluation: Tracking, Measuring and Reporting

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The organization measures and evaluates the effectiveness of its volunteer involvement strategy in helping to support its mandate. An evaluation framework is in place to assess the performance of individual volunteers and gauge volunteer satisfaction. Standardized documentation, records management practices and procedures track and record volunteer involvement.

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### **Volunteer Roles and Recruitment**

Volunteer roles contribute to the mission of the organization and clearly identify the skills and abilities needed. Volunteer roles involve volunteers in meaningful ways that reflect their skills, needs, interests and backgrounds. Volunteer recruitment incorporates a broad range of strategies to reach out to diverse sources of volunteers.

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### **Risk Management**

Risk management procedures are in place to assess, manage and/ or mitigate potential risks to the volunteers, the organization, its clients, staff, members and participants that may result from the delivery of a volunteer-led program or service. Applicable Health and Safety protocols are followed. Each volunteer role is assessed for level of risk as part of the screening process.

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### **Screening**

The organization has a clearly communicated and transparent screening process in place. It is aligned with the risk management approach and consistently applied across the organization. This may involve a Vulnerable Sector Check when vulnerable populations are involved. See Volunteer Canada's 10 Steps of Screening.

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### **Orientation and Training**

Volunteers receive an orientation to the organization including the policies and practices appropriate to each role. Each volunteer also receives training specific to their role and their individual needs.

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### **Support and Supervision**

Volunteers receive the level of support and supervision required for the role and are provided with regular opportunities to give and receive feedback.

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### **Recognition: Valuing Volunteer Involvement**

The organization acknowledges the contributions of volunteers using a range of recognition tools and activities that reflect the needs of the volunteer. The value and impact of volunteer contributions are understood and acknowledged within the organization and communicated to the volunteer. See Volunteer Canada's 2013 Volunteer Recognition Study and PREB.

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### **The Value of Volunteer Involvement**

Volunteer involvement has a powerful impact on Canadian society, communities, organizations, and individuals.

~~Volunteer involvement is fundamental to a healthy and democratic society in Canada~~

- It promotes civic engagement and active participation in shaping the society we want
- It gives everyone a voice and the space to contribute to the quality of life in communities

#### **Volunteer involvement is vital for strong, inclusive, and resilient communities**

- It promotes change and development through the collective efforts of those who know the community best
- It identifies and supports local strengths and assets to respond to community challenges while strengthening the social fabric

#### **Volunteer involvement builds the capacity of organizations**

- It provides organizations with the skills, talents, and perspectives that are essential to their relevance, vitality, and sustainability
- It increases the capacity of organizations to accomplish their goals through programs and services that respond to and are reflective of the unique characteristics of their communities

#### **Volunteer involvement is personal**

- It promotes a sense of belonging and general wellbeing
- It provides the opportunity for individuals to engage according to their personal preferences and motivations

#### **Volunteering is about building relationships**

- It connects people to the causes they care about, and allows community outcomes and personal goals to be met within a spectrum of engagement
- It creates opportunities for non-profit organizations to accomplish their goals by engaging and involving volunteers, and it allows volunteers an opportunity to engage with and contribute to building community

#### **Guiding Principles for Volunteer Involvement**

##### **Volunteers have rights. Nonprofit organizations recognize that volunteers are a vital human resource and will commit to the appropriate infrastructure to support volunteer engagement.**

- The organization's practices ensure effective volunteer involvement.
- The organization commits to providing a safe and supportive environment for volunteers.

##### **Volunteers have responsibilities. Volunteers make a commitment and are accountable to the organization.**

- Volunteers will act with respect for the cause, the stakeholders, the organization, and the community.
- Volunteers will act responsibly and with integrity.

#### **Organizational Standards for Volunteer Involvement**

The Code is a road map for integrating volunteers strategically into the work of an organization. It helps leaders understand the value and impact volunteer involvement can have in advancing the organization's mission. By adopting the standards outlined below, the organization demonstrates a commitment to engaging and supporting volunteers in a meaningful and responsible way.

#### **1.—Mission-based Approach**

The organization's Board of Directors and senior staff acknowledge, articulate, and support the vital role of volunteers in achieving the organization's purpose or mission. Volunteer roles are clearly linked to the organization's mission.

#### **2.—Human Resources**

Volunteers are welcomed and treated as valued and integral members of the organization's human resources team. The organization has a planned and integrated approach for volunteer involvement that includes providing appropriate resources to support volunteer involvement.

#### **3.—Policies and Procedures**

A policy framework that defines and supports the involvement of volunteers is adopted by the organization.

#### **4.—Volunteer Administration**

The organization has a clearly designated individual(s) with appropriate qualifications responsible for supporting volunteer involvement.

#### **5.—Risk Management and Quality Assurance**

Risk management procedures are in place to assess, manage, or mitigate potential risks to the volunteers, the organization and its clients, members and participants that may result from the delivery of a volunteer-led program or service. Each volunteer role is assessed for level of risk as part of the screening process.

#### **6.—Volunteer Roles**

Volunteer roles contribute to the mission or purpose of the organization and clearly identify the abilities needed. Volunteer roles involve volunteers in meaningful ways that reflect their skills, needs, interests, and backgrounds.

#### **7.—Recruitment**

Volunteer recruitment incorporates a broad range of internal and external strategies to reach out to diverse sources of volunteers.

#### **8.—Screening**

A clearly communicated and transparent screening process, which is aligned with the risk management approach, is adopted and consistently applied across the organization. See 10 Steps of Screening, below.

#### **9.—Orientation and Training**

~~Volunteers receive an orientation to the organization, its policies, and practices, appropriate to each role. Each volunteer receives training specific to the volunteer role and the needs of the individual volunteer.~~

#### **10.—Support and Supervision**

~~Volunteers receive the level of support and supervision required for the role and are provided with regular opportunities to give and receive feedback.~~

#### **11.—Records Management**

~~Standardized documentation and records management practices and procedures are followed and are in line with current relevant legislation.~~

#### **12.—Technology**

~~Volunteers are engaged and supported within the organization through the integration and intentional use of current technology. New opportunities to strengthen volunteer engagement and capacity through the use of technology are evaluated continually.~~

#### **13.—Recognition**

~~The contributions of volunteers are acknowledged by the organization with ongoing formal and informal methods of recognition, applicable to the volunteer role. The value and impact of volunteer contributions are understood and acknowledged within the organization and communicated to the volunteer.~~

#### **14.—Evaluation**

~~An evaluation framework is in place to assess the performance of volunteers and gauge volunteer satisfaction. The effectiveness of the volunteer engagement strategy in meeting the organization's mandate is also evaluated.~~

### **B. Policies and Procedures**

#### **Roles and Responsibilities**

The development and inclusion of policies and procedures specific to the function of volunteer involvement is vital to its success. Policies and procedures express the intention and guiding principles and expressed practices of an organization. Policies and procedures specific to volunteers articulate the role of volunteers, the rights and responsibilities of the organization in the management of the volunteers, and the rights and responsibilities of the volunteer toward the organization, its constituents, and the people it serves.

To assure the place of volunteers within an organization, it is recommended that a formal statement about the presence, importance and role of volunteer involvement be included in the policies and procedures. Many organizations have predicated their volunteer involvement policies by adopting

either the *Canadian Code of Volunteers* or PAVRO's Standards of Practice and Ethics, as the anchor to their policies and procedures on volunteer involvement.

The adoption of a fully articulated document is not only time saving for any organization but assures they are operating their programs in accordance with accepted provincial or national standards. Every Volunteer Manager should take the time to review the Code or the Standards in detail and encourage management staff and Board members to do the same.

### Adoption of the Volunteer Code or Standards of Practice and Ethics as Anchor

The baseline provided by adopting the Code is then reinforced with policies and procedures standard to most organizations such as non-discrimination, health and safety, privacy, risk management, etc.

Each policy level cascades and reinforces the one above and the one below it. For example, at the top-level organizations often have policies regarding professional conduct and harassment-free workplaces. The next level, or department level, will often see policies and specific procedures for practices that uphold the spirit of the policy within specific circumstances, i.e., Volunteer Code of Conduct ([see Section C: Orientation, Code of Conduct](#)).

~~A Volunteer Code of Conduct outlines the mission and values of the organization, the purpose of the volunteer involvement, and expectations.~~

#### ~~Sample Code of Conduct:~~

~~As a volunteer, you will:~~

~~Agree and adhere to the volunteer policies outlined in the Volunteer Handbook.~~

- ~~• Represent the organization positively to its stakeholders and the community.~~
- ~~• Treat other volunteers, staff and clients with respect.~~
- ~~• Support a safe harassment free work environment.~~
- ~~• Decline all offers of remunerations, salary, wages or any other payment for volunteer service.~~
- ~~• Use organization property and facilities as authorized.~~
- ~~• Never divulge or misuse confidential information.~~

~~As an organization, we will:~~

- ~~• Clearly outline volunteer responsibilities and expectations clearly.~~
- ~~• Provide appropriate orientation and training.~~
- ~~• Treat you with respect, courtesy, and fairness.~~
- ~~• Respect your right to privacy and confidentiality.~~
- ~~• Provide a supportive and positive environment that ensures you enjoy your volunteering.~~
- ~~• Provide an avenue where volunteers can voice questions or concerns.~~
- ~~• Encourage and recognize volunteer efforts and achievements.~~

- ~~Provide information on organizational changes or new policy decisions relevant to volunteers.~~

## Volunteer Policies

Policies and procedures are the foundations of solid volunteer management. Policies define expectations, guide actions and support volunteer needs. Procedures explain how policies are applied. There is no magic number of policies and procedures; however, there is such a thing as too few OR too many. Policies and procedures should be living program structures and supports. Review policies and procedures annually.

Below is a sample policy:

Policy amendments are subject to ratification by the Board of Directors which has final responsibility for such amendments and reserves the right to amend these policies in any way at any time.

Below are suggested policy and procedures areas and questions which will help focus policy and procedure construction:

### Training:

1. Who determines what training volunteers receive?
  2. How is training planned and scheduled?
  3. What are the training materials?
  4. Where are training materials kept?
  5. How often are training materials reviewed and updated? Who does this?
- ~~—What happens to volunteers who do not complete training with satisfactory outcomes?~~

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Evaluation:

1. How often are volunteers evaluated?
2. What are the evaluation tools?
3. Who evaluates volunteers?
4. Is feedback from volunteers also solicited? If yes, how is it solicited?
5. Are there policies on both formal and informal evaluation?

Attendance and Time:

1. How is attendance tracked? Where?
2. How is time spent volunteering tracked? Where?
3. How often is attendance and time tracking reviewed?
4. Who should be notified of a volunteer's absence if it is pre-arranged? How? Ideally, how far in advance?

Supervision and Reporting:

1. How are volunteers informed of who they report to and introduced to their supervisor?
2. Does the volunteer know who to report concerns to?
3. How are interpersonal conflicts addressed?

Change of Placement:

1. What is the process for requesting a placement change?
2. How should the volunteer manager make a change in placement?
3. What documentation is involved in re-assignment?
4. Does an existing volunteer have to apply for a new position? What screening should an existing volunteer undergo in the event of re-assignment?

Service Requirement:

1. What is the minimum commitment required of volunteers? Of specific positions?
2. How are extended leaves of absence handled?

Dress Code:

1. What is the dress code?
2. Which positions are obligated to abide by the dress code? Which are exempt?

Youth Volunteer and Service Learning:

1. What is the minimum age for volunteers? Certain positions?
2. What are the processes for gaining parental consent and references for youth volunteers?
3. What other requirements must be met before students volunteering for their service-learning hours for school can become volunteers?

Property:

1. What organizational property will volunteers have access to/require for their volunteer work?
2. What organizational facilities will volunteers have access to/require for their volunteer work?
3. What is considered improper use of property and facilities?
4. If any equipment, machines, tools or property appears to be damaged, defective or missing, how should it be reported? To whom?
5. What actions are taken in case of property theft, loss or damage?

Smoking:

1. What is the (non-)smoking policy?
2. Is there a place on site designated for smoking?
3. Under what circumstances is smoking prohibited?

Health and Safety:

1. How are volunteers trained on health and safety procedures?
2. Does everyone, including staff, know where First Aid kits, fire extinguishers and emergency numbers are kept?
3. Does everyone know who on-site is First Aid certified/trained?
4. How should on-site injuries/accidents be reported?
5. What is the follow-up action?
6. How is a right to refusal of work handled?

Reimbursement of Expenses:

1. Are volunteers eligible for reimbursement of pre-approved out-of-pocket expenses?
2. Under what circumstances is an expense considered ineligible?
3. What is the process for re-imburement?

Emergency Closing:

1. How is emergency closing determined?
2. How is this information communicated to volunteers?
3. How does inclement weather affect volunteer work?

Security:

1. Do volunteers have a place to put their personal property on-site (coats, purses, etc.)?
2. How is theft or damage of volunteer property on-site addressed?

Harassment and Discrimination:

1. What behaviour is considered harassment?
2. What behaviour is considered discrimination?
3. What is the process for reporting these incidents? To whom?
4. How are these incidents addressed?

5. What are the consequences of these incidents?

Conflict of Interest:

1. What is considered a conflict of interest for volunteers?
2. How are conflicts of interest addressed?
3. Who addresses conflicts of interest?
4. Is accepting payment or gifts as a volunteer appropriate?

Use of Organizational Affiliation

1. How can volunteers safeguard the reputation and integrity of the organization?
2. Are there limitations to how a volunteer can use his/her affiliation with the organization?

Confidentiality:

1. Do volunteers have access to confidential information?
2. Why is that information confidential?
3. How is confidentiality maintained? What are the expectations?
4. What statements can a volunteer make on behalf of the organization, officially and unofficially?
5. Is a Confidentiality Agreement available and necessary for volunteers to sign before service?

Discipline and Dismissal:

1. What are considered grounds for discipline?
2. What are considered grounds for dismissal?
3. How is disciplinary action determined?
4. How is disciplinary action documented?
5. Who conveys disciplinary action to the volunteer(s)?

Privacy

1. What collected information is considered private?
2. Under what circumstances is private information collected?
3. Who has access to private information? Which information?

### **Role of the Volunteer Manager in Policy Development**

Policies and procedures change and grow over time to reflect the life of the organization. It is best to have a full set of volunteer policies and procedures in place before the process of volunteer involvement commences. Familiarization with all relevant policies and procedures is part of a Volunteer Manager's orientation for any new position. It is the responsibility of the Volunteer Manager to track and recommend changes to these policies, either in response to a specific need, or on an annualized basis as directed by the Board of Directors, or delegate(s) who oversee policies and procedures.

**Q: List your policies here (including policies addressing the preceding topics):**

**Q: To whom does your Volunteer Manager address concerns regarding the revision or addition of volunteer policies and procedures?**

## Preparing for the Volunteer

### A. Risk Management

Organizations have a legal, moral and ethical responsibility to reduce the exposure of risk to the organization, staff, volunteers and clients. Risks that are not identified cannot be managed or mitigated. So take the time to identify risks within your volunteer program and address them. In other words, identify, assess and prevent.

Below are some suggested steps that will allow your organization to minimize the risks of harm, loss and liability:

1. Complete risk assessment checklist for both new and existing volunteer positions to identify what risks are involved and what possible solutions can be applied to minimize or eliminate the exposure to risk.
2. Review risk assessments annually, with position descriptions amended to reflect new risk assessment results.
3. Know the organization's insurance requirements. Purchasing insurance is not the only way to address risk, but it is a necessary step to consider for your organization and its volunteer program.
4. Incorporate risk management into your strategic planning at the program level and the organization level.
5. Identify and reduce risk exposure with volunteer management policies. Clearly address risk expectations of volunteers, staff and the organization to help protect your organization's people from harm, loss and liability.
6. Change management is an important part of risk management. Your volunteer program must be ready to respond to and initiate change, from recruitment and management practices to service delivery.

Below is a checklist of topics that may help focus risk management discussions in your organization:

- a. Policies and Boundaries
- b. Board Governance and Liability
- c. Volunteer Engagement in areas like Driving, Unsupervised Volunteer Work, Special Events
- d. Funding and Budgeting
- e. Cyberspace and Technology
- f. Intellectual Property
- g. Privacy
- h. Discipline
- i. Service Continuity and Crisis Management

## B. Screening

Volunteer Canada strongly advises that all volunteer-involving organizations and their volunteer managers follow the Ten Safe Steps of screening to ensure a thorough and consistent screening process.

1. **Determine the risk.** Identifying and analyzing the risk in programs, services and volunteer positions may lead to anticipating, preventing or eliminating risk altogether.
2. **Create position descriptions.** Position descriptions which clearly outline all responsibilities and expectations, including screening requirements, are essential to finding and keeping the right volunteer in the right position.
3. **The recruitment process.** A formal recruitment process, which is clear and consistent, allows potential volunteers to screen themselves out by being specific about the position descriptions and expectations.
4. **The application form.** This screening tool is your introduction to the potential volunteer. The application form collects important personal information about the volunteer. Ensure that all information collected is consistent with privacy and human rights legislation.
5. **Interviews.** Applicants should all be asked the same questions for consistency. Ensure that interview questions allow for responses that are directly related to an applicant's relevant work and volunteer experience and other pertinent information.
6. **Reference checks.** References will confirm the background and skills of applicants and will provide another perspective on the suitability of the applicant for the position. Screening practices must be consistent: all references offered by applications must be checked.
7. **Police Record Checks.** Use police record checks with caution. The Canadian Human Rights Act permits discrimination on a criminal conviction for which a pardon has not been granted. If a Police Records Check for the volunteer position is required, a volunteer must prove and pass a Police Records Check before commencing volunteer activities.
8. **Orientation and training.** This screening period allows the organization and the volunteer to determine that each has made the right choice, and these requirements are integral to the placement.
9. **Supervision and evaluation.** These on-going processes are key to ensuring a standard level of practice and improving the experiences of volunteers, staff and clients.
10. **Follow-up.** In addition to the volunteer, the client/participant of a program also requires follow-up.

A blanket approach to screening is ineffective and should never be used – screening must be adapted to suit the characteristics of the positions to be filled and your volunteer program.

**Q: Here, list additional screening practices used by your organization:**

For more resources go to Imagine Canada's Insurance & Liability Resource Centre for Nonprofits (<http://nonprofitrisk.imaginecanada.ca/node/884>).

## Police Record Checks

Police Record Checks, sometimes more formally known as Criminal Background Checks, or Vulnerable Person Screening, have been the subject of much discussion in the mid 2000s in Canadian volunteer management circles. In an effort to manage risk to the organization and protect vulnerable clients/patients, Volunteer Managers have included Police Record Checks as part of their screening practice for many years. Effective November 1, 2018 with the implementation of the Ontario Police Record Checks Reform Act, there are changes to criminal record checks allowed for youth and to the types of record checks that are offered. There are three Record Checks available: the Criminal Record Check, the Criminal Record and Judicial Matters Check, and the Vulnerable Sector Check. Local Police Services and Associations for Volunteer Administration are good sources of information about what IS included, and what is NOT included, in each type of check. Police record checks for anyone under the age of 18 will ONLY be conducted when it is for employment or to volunteer with a municipal, provincial or federal government department/ministry or agency. Provisions under the Police Record Checks Reform Act, prohibit police services from providing the results of any type of record check for someone under the age of 18 to any non-government of employer or organization. There are three Record Checks available: the Police Criminal Record Check, the Police Information Check, and the Police Vulnerable Sector Check. Local Police Services and Associations for Volunteer Administration are good sources of information about what IS included, and what is NOT included, in each type of check.

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The growing popularity of this practice in the nonprofit sector, along with an increased demand from the employers in the private and government sectors, placed a great strain on Police Services across Canada. This resulted in long waits for the service. This delay often discouraged volunteers, who sought other opportunities rather than wait for several months to access a volunteer position.

### LEARN Guidelines

In 2010, the LEARN Guidelines, incorporating RCMP rules and Ministerial Directives, were developed to assist police agencies in understanding and applying relevant legislation, policies and procedures; promoting consistency in processing methods; and promoting consistent terminology used by Police Services throughout the Province of Ontario. In July 2010, enhancements were made to the Canadian Police Information Centre (CPIC) system for querying pardoned sex offender records (vulnerable sector query). The change addressed a situation with those who have legally changed their name in Canada. In most provinces and territories, fingerprints are not taken when a person changes their name and jeopardizes the vulnerable screening process once the person has received a pardon for a sexual offense. More importantly, this may put vulnerable persons at risk.

### Fingerprinting

When a Police Vulnerable Sector Check is done, if the applicant's name is the same or similar to a person with information of concern to Police, the applicant will be asked to submit fingerprints to clearly distinguish themselves as someone other than the person of concern. This was intimidating and sometimes inconvenient at first for many volunteers. An understanding of the concerns of the Police

and the knowledge that the extra effort was in the best interests of the vulnerable population being served, led to the acceptance of the process by most volunteers.

### **Streamlining the Process**

Many local Police Services have instituted new processes to meet the increased demand for Police Record Checks in one way or another at the time of this publication. The London Police Service (LPS) has undertaken a streamlining of their process with the result of greatly reduced waiting times. At the time of publication, the LPS is well along in its preparation to go to an all online Police Record Check process. This will take some adaptation by local agencies, who will all have to have agreements with the LPS in order to have Police Record Checks done and who will have to find alternative processes for those who are either unable or unwilling to access the Internet to complete their application.

### **Cost Benefit Analysis of Checks**

The challenges and changes experienced with Police Record Checks in the 2000s have led to earnest discussions about the benefits and necessity of Police Record Checks as a screening and risk management tool. The Police themselves will tell you that Police Record Checks are an imperfect and incomplete screening tool and, as such, should remain as only one part of a screening process comprised of many tools. When Police Record Checks were quick and inexpensive some organizations adopted the policy of a blanket approach, insisting all staff and volunteers be subject to a Police Record Check before being accepted for employment or volunteer assignment. While the blanket approach to Police Checks seems prudent from an organization risk management vantage point, its wisdom in the timely engagement of volunteers, and the best use of volunteer management resources, bears a second look.

Ask the questions “what and whom” are you trying to protect and what is the most appropriate and effective way to reduce or alleviate risk for those people or entities, in any given situation? You may find that certain volunteers roles bear very little risk for your organization or the people within it. What risk there is can, and often should, be managed in a more specific and focused manner than a Police Record Check. Hundreds of volunteers are engaged each year in activities such as marshalling walk or run routes, planting trees, or virtual volunteering, which have specific risk profiles. While each situation needs to be carefully considered – will there be unsupervised access to vulnerable people; will there be staff or supervision; will there be access to cash or sensitive information? – consideration of the specific nature and degree of risk, along with what other risk mitigation tools are available and appropriate, should be considered. Frank and full discussion with staff, management, stake holders and the Board of Directors will lead to the best combination of risk management tools and processes for each organization.

### **Waivers**

Waivers are a risk management tool that is best created for the specific needs of your organization by your organization's risk management personnel and/or legal counsel. Some agencies have separate waivers and agreements and others combine the two areas.

Waivers cover:

A variety of topics:

- Health and safety
- Medical treatment
- Assumption of risk
- Agreement not to sue
- Use of images

A variety of venues:

- Organization facilities
- Rental facilities
- Public areas
- Special events

A variety of parties:

- Organization
- Partners
- Donors
- Sponsors
- First aid providers

Agreements cover volunteer commitment to:

- Take required training
- Act in accordance with standards
- Abide by relevant policies and procedures

## Finding and Preparing Volunteers

### A. Recruitment

It is generally accepted among Volunteer Managers that you should recruit volunteers only after you have well-defined, written volunteer position descriptions and you have an immediate next step for individuals who call or e-mail about these opportunities. Furthermore it is best if you recruit volunteers only if you have meaningful projects to work on. People who respond have reached the stage where they want to get involved and are anxious to get started. If you don't have something meaningful for them to do immediately they may lose interest and go elsewhere.

#### Position Description

Position descriptions are one of the most important elements of your volunteer program - they can assist in fulfilling all the aspects of Volunteer Management.

- **A position description is a key recruitment tool.** It clarifies what kind of skills, qualities and experiences the volunteer should have to be successful in this position.
- **A position description allows for screening.** Referring to the position description helps identify which candidates are suited for the position and which are not. Candidates can also self-screen by referring to the position description and determining whether or not they are suited for the position.
- **A position description determines necessary training.** With a clear idea of the work involved, and the skill and experience set best suited for the position, a training program can be designed. This will ensure that new volunteers have all the tools necessary to effectively do the work assigned to them.
- **A position description helps evaluate the work performed.** It defines desired outcomes and expectations which will help the volunteer manager recognize a volunteer for a job well done or take corrective action for a volunteer who is struggling, and in some cases, help initiate the process of termination.

Position descriptions should be reviewed annually and before recruiting new volunteers. Also, changes to position descriptions must be made to all copies (paper and electronic), as well as communicated to the volunteer in that position.

Here is a position description checklist:

- Title
- Organization's Mission and/or Vision
- Client group
- Goals
- Responsibilities
- Skills/Abilities needed
- Expected time commitment

- Limitations (if any)
- Qualifications
- Available orientation/training
- Supervision and evaluation provided
- Working conditions/environment
- Benefits to volunteer
- Impact on the community
- Screening measures

**Q: Here, list additional elements used in your organization's position descriptions:**

## Marketing

People volunteer for a variety of reasons. A clear "ask" is a time tested approach.

Below are some suggested marketing and advertising practices that may assist you to recruit new volunteers:

- **Know what people you want.** If you are looking for a specific skill set or certain demographics for your volunteer positions, make that clear – save yourself time screening out unsuitable candidates when they can self-screen.
- **Targeted marketing.** Schools, businesses, services clubs and religious-affiliation organizations are just a few of the pools of volunteers. Schools and businesses are particularly important to target if you are looking for volunteers with specific skills.
- **Use resources available to you.** Take advantage of the services offered by volunteer centres and your organization's own communications, like newsletters.
- **Social media.** Do not shy away from using the Internet to advertise your need for volunteers, be it on your website, social media, chat groups and forums.
- **Emphasize the positives.** Be clear about the benefits from volunteering with your organization and your organization's achievements.
- **Word of mouth.** Personal asks are a great way to recruit volunteers. Remember too that you can ask your organization's volunteers if they are interested in taking on new and additional responsibilities.
- **Tourists, travellers and guides.** If your organization is welcoming and encourages visitors, they may be tempted to get involved as volunteers.

### *Targeted Marketing*

Canadians are busy and want well-defined, and sometimes time-limited, assignments. More emphasis is now put on the Volunteer Manager, task force chairs, or staff, to clearly define the specific roles, tasks, and goals of volunteer work. The invitation to join a committee in an unspecified capacity, for an indeterminate period of time, for a yet to be determined project, is no longer appealing to most people. While articulating role, tasks, goals and time lines can be time consuming, its reward is identifying a clear focus for *who* you need (skill set) and therefore *where* you can find them. It also sets the stage for getting the work done quickly and efficiently.

Targeted marketing has a long history in the private sector. Fundraising professionals have adopted and adapted its strategies. Most recently, Volunteer Managers have begun to use its tactics to recruit volunteers. Becoming familiar with the basic tenants of marketing theory will enhance the Volunteer Manager's ability to design a recruitment strategy. Whether this is done in conjunction with an in-house marketing or communication staff, or independently, familiarity with the basic concepts will be helpful.

Targeted marketing specifically focuses on developing a relationship with a particular set of people with the aim of selling them a product designed to meet their needs. The product in the case of the Volunteer Manager is the volunteer opportunity. The target market is the group of people that possess the specific skills necessary for the volunteer opportunity. For example, if you require "Money Counters" to receive, count, document and prepare cash for deposit following a fundraising event, your target market will be people with those skills. People with money handling and deposit experience can be found in banks, retail outlets and casinos. Consider contacting a representative from these businesses to see if they would allow a recruiting drive within their location. The rise of corporate social responsibility and employee interest in giving back to the community makes this an easy sell now more than ever. The Internet can be very helpful in locating associations built around members with certain skills, sets or certifications.

### **Social Media**

The changing world, including technology, is having an impact on volunteerism. Many existing and potential volunteers are technologically savvy and social media offers a key marketing and recruitment tool. There are many social media tools so understanding these tools and their target markets will be an important first step. A social media and marketing strategy will evolve as tools evolve. Understanding the personal and professional uses of each social media tool will be important to consider.

Having your organization website up-to-date with how to volunteer and what volunteers do for your organization is important so that you can drive potential volunteers from social media to your website.

Word of mouth is the most popular form of volunteer recruitment. Providing volunteers with a positive experience is important, so have the word of mouth recommendations be positive both in person and on social media. When individuals are asked why they do not volunteer, the simple answer is no one asked. Social media is a way to expand word of mouth and your reach and make that

ask. Asking existing volunteers to share volunteer opportunities through their social media networks can be a valuable recruitment tool.

### **Tourists, Travellers and Guides**

Much has been written about the intentional and tightly focused recruitment of volunteers. A new understanding and articulation of a process of volunteer recruitment that had been going on for decades has emerged. The analogy, coined by Chris Jarvis and Angela Parker of Realized Worth ([www.realizedworth.com](http://www.realizedworth.com)), is that of the Tourist, the Traveller and the Guide. What Jarvis and Parker realized is that there is a steady stream of people in and out of most organizations. Some never return, some return once or twice, and others stay long term and become our stalwart volunteers. They asked the questions: who are these people; what makes them different from each other; and is there anything we can do to increase the number of people who stay and become invested in our organization?

#### **Tourists**

What they discovered is this group of people – the masses – are like tourists. The vast majority come into our organizations just to have a look around. They are excited, enthusiastic and awkward. They want to love their experience. If they don't, they probably won't come back. Don't expect long term commitment from this group – they're not ready yet. Show them around, give them space, be cordial and informative. Be observant – what do they respond to; what piques their interest; what are they good at?

#### **Travellers**

The next group – those who come back once or twice or semi-regularly – are travellers. They have been here before. They know where to go when they arrive and what they like doing the best. They begin investing in the cause. They may ask hard questions and even complain a little. They want to be seen and heard. They want someone to confirm they belong. They may be a little cynical. They want to make sure they will be acknowledged and their investment will bear fruit.

#### **Guides**

The third group are guides. This group is dependable. They've come to own the space and welcome others. They're looking to be recognized with increased responsibility. The relationship needs to be treated carefully. This kind of long term commitment is rare. These people are gold. They will recruit, train, and mentor volunteers. They will take ownership of projects and suggest new ones.

This new paradigm offers new options for recruiting from within and retention based on relationship building, collaboration, and negotiation, rather than traditionally accepted expressions of reward. In fact, it insists on it. Daniel Pink, in his landmark short film "Drive" asserts that if you pay people enough to take money off the table (of concern) they are motivated by mastery, autonomy, and the desire to contribute to the betterment of humanity.

You cannot force people to move from tourist, to traveller, to guide. Your awareness and attention to the characteristics and needs of the people on each plateau will engender and encourage movement. Gentle shepherding will discourage an exit to greener pastures. At the same time accept when it's not a good fit. Focus on cultivating those who show signs of growth.

The tricky part comes in managing these relationships so the needs of the volunteers are met in the pursuit of the mission of the organization with an understanding that the final authority rests in the hands of the management and Board of Directors.

Challenging – yes, but people always are...and they're worth it.

### **Administrative Practices**

Consider the following for your volunteer program's marketing and advertising efforts:

- Updates to recruitment materials must be finalized and implemented by the volunteer manager
- Keep records of where, when and what has been advertised
- Review volunteer applications frequently and respond to all queries regarding your volunteer positions, even if a candidate is not suitable for your organization or volunteer position
- Any personal or sensitive information gathered about a volunteer must be documented and stored in a locked, secure area in accordance with privacy information

**Q: Here, list additional marketing and advertising tools and ideas:**

## **B. Selection**

### **Policies and Practices**

Here is a suggested policy checklist for recruitment and selection:

- Job description
- Selection criteria established
- Application form
- Interview
- Qualifications checks
- Reference checks (consistent and directly related to bona fide position requirements)

- Police Records Checks
- Immunization records (where applicable)
- Valid driver's license and, if necessary, driver's abstract
- Volunteer preferences, skills and abilities

Policies are necessary to address certain issues that you may encounter when recruiting. These policies should outline:

- What will disqualify someone from a position based on the position description, reference check outcomes and other screening measures
- What to do if:
  - more than one outstanding candidate qualifies for a single position
  - a candidate just does not seem to be the right fit
  - a candidate's references checks yield mixed results (one reference is less than satisfactory but another is good)
  - a candidate's interview sets off red flags
  - a candidate's criminal record shows up that is old, or the offence is irrelevant to the position

You will not accept every individual who applies to volunteer with your organization. Here are some suggested practices when rejecting a candidate:

- Be prompt
- Be sensitive
- Keep the results confidential
- Take a personal approach and call the candidate
- Saying less is better. It is unnecessary to divulge ALL the reasons why someone was not hired (unless you are asked directly)
- Thank candidates for their interest in your organization and volunteer program
- Refer these candidates to other volunteer opportunities to pursue (direct them to your local volunteer centre)

### **Qualification Checks**

The movement of volunteers into increasing levels of responsibility, project management and professional services begins with request for CVs, resumes and proof of Professional Certification. While it may seem somewhat unnerving to request a professional to provide such documentation, it sets the stage for the tone of the interaction between the volunteer and the nonprofit organization. The organization is engaging a professional on a pro bono basis to conduct business or complete a service on their behalf. This work will be subject to all the same legislation, inspection and risk management practices, as it would if it were being completed on a paid basis. Credentials to work in Canada are important. Although the opportunity for new Canadians to gain experience in Canada through volunteer work is vital, it is only viable for the organization if they are certified to ply their trade in Canada.

Reputable professionals will understand this and be accustomed to the review and verifications of their credentials. This practice both provides clarity for determining suitability for a volunteer role and is a necessary component for risk management.

Any activity that impacts the health and safety of staff, service users, or the general public, while in contact with a nonprofit organization, requires due diligence including relevant insurance coverage. Always be sure to clear any agreements for professional services, or contracts with the executive director or CEO before commencing work with a professional.

### **Interviewing**

Once the documentation is verified, the next step will be an interview. This may take the form of a business negotiation, or the tone of an employment interview. Here we focus on the latter. The benefits of a behaviour-based interview technique are well documented and accepted in the field of Human Resources. The behaviour-based approach to interviewing is a structured approach that uses statements and open questions about past performances to collect information in order to predict how a candidate will perform in the future. Behaviour-based questions avoid the pitfalls of:

- Telegraphing questions: which contain elements of the answer in the question – e.g., “We are a well-established, traditional organization that is slow to change; how do you feel about working in an environment that is steeped in tradition?”
- Hypothetical questions: which get you hypothetical answers – e.g., “How would you handle a client who was angry from having to wait a long time for service?”
- Rating questions: which are inherently loaded with risk of falsehood – e.g., “On a scale of 1-10, 1 being low and 10 being high, how would you rate your customer service skills?”

Behaviour-based questions are designed to avoid these pitfalls by requiring the candidate to recollect an incident in their past and articulate how they responded and what the outcome was. The interviewer is left to do the analysis and identify the skills, procedures and knowledge presented. Behaviour-based questions are only one part of the interview process. Familiarity with all aspects of the interview process is vital to successful selection.

The PAVRO Standards of Practice and Ethics recommends developing a scoring system for interview questions to help guide your assessment of candidates, insuring that you make solid decisions about applicant suitability.

## **C. Orientation**

### **Creating an Ambassador**

Orientation begins the fulfillment of the two-way flow of benefits between volunteers and the organization in which they volunteer. Some organizations provide orientation before interviewing and screening as a means to self-selection in or out of their volunteer program. Others provide orientation as the primary introduction and welcome to volunteers after they have been selected to serve.

No matter the placement of orientation, the opportunities it provides remain the same. It is a prime promotion and education tool. A volunteer, who is well versed in the mission (who is being served, how they are being served), programs, funding, partners, and personnel of an organization and what it needs from the community to succeed, is a valuable envoy for the organization. Volunteers are dynamic, community-minded, resourceful people who have a multiplicity of connections in all sorts of places.

The importance of a volunteer's understanding of the organization in which they have elected to serve cannot be understated. The proliferation of nonprofit organizations in the last 25 years means the identity of any one body gets blurred. It is important that volunteers understand where they are and can communicate this clearly to others. It would be most unfortunate if a volunteer was talking up their experience about the fantastic work your organization is doing using the wrong organization name.

### **Creating a Road Map**

A succinct and well-delivered orientation provides the volunteer with a road map to your organization. It is the beginning of their process of finding where they belong and how they fit in. It outlines their options for movement and advancement if they have a restless spirit or aspirations to grow. If you are doing the training, it is their first impression of you, your ability to be engaging, your training, and your passion for the organization. Be sure to practice, practice, practice. Be aware of the tenets of adult education and allow for various learning styles (see "Section D - Training" below). Be prepared to accommodate new Canadians for whom English is a second language, and whose cultural norms prepare them for different learning patterns and rates of participation. If you have more than one location or trainer, take steps to assure consistency in materials and delivery across the board.

The Volunteer Manager's responsibilities include:

- Ensuring that new volunteers receive the Volunteer Handbook (or equivalent) and have read and understood it
- Reviewing and training volunteers on safety training and testing procedures before they can start volunteering
- Reviewing practical information with volunteers, including shift scheduling, facility tours and introductions to staff and other volunteers

Additionally, when necessary, the volunteer manager can:

- Pair a new volunteer with an experienced volunteer for on-site shadowing
- Introduce a probation period for a new volunteer
- Subsequently schedule and conduct a performance review with the volunteer, with continuing service, re-assignment or termination as options

**Q: Here, list your organization's orientation practices:**

### Code of Conduct

A Volunteer Code of Conduct outlines the expectation of the behaviour of volunteers. It is linked directly to the mission and values of the organization and the importance and purpose of the volunteer involvement. Volunteer codes of conduct make it clear that, although the person is not being paid to perform work on behalf of the organization, they will still be held to the same standard as paid employees when it comes to the treatment of others, appropriate boundaries, health and safety practices, confidentiality, conflict of interest, fulfillment of work commitments, and acting as a representative of the organization in the performance of their duties.

Below is a sample of the points contained in a Volunteer Code of Conduct.

As a volunteer, you will:

- Agree and adhere to the Volunteer Policies outlined in the Volunteer Handbook
- Represent the organization positively to its stakeholders and the community
- Treat other volunteers, staff and clients with respect
- Support a safe harassment-free work environment
- Decline all offers of remunerations, salary, wages or any other payment for volunteer service
- Use organization property and facilities as authorized
- Never divulge or misuse confidential information

Likewise, your organization can make an official commitment to volunteers. Below is a sample.

As an organization, we will:

- Clearly outline volunteer responsibilities and expectations ~~clearly~~
- Provide appropriate orientation and training
- Treat you with respect, courtesy, and fairness
- Respect your right to privacy and confidentiality
- Provide a supportive and positive environment that ensures you enjoy your volunteering

- Provide an avenue where volunteers can voice questions or concerns
- Encourage and recognize volunteer efforts and achievements
- Provide information on organizational changes or new policy decisions relevant to volunteers

### **Enforcement**

Volunteers need to be made aware of when, how and to whom they address concerns about the Code of Conduct. It is important they feel the Code will be enforced and infractions addressed. Like any “legislation” or rule it is only as good as the organization’s ability and willingness to enforce it. Some organizations now clearly articulate conflict resolution guidelines and processes to provide resources to those in need of assistance in resolving their differences in an orderly and professional manner.

Volunteers should be provided with copies of the Volunteer Code of Conduct and any other relevant policies they are required to sign, such as Confidentiality or Conflict of Interest.

## **D. Training**

Training plays a key role in the engagement and retention of volunteers. Training begins with orientation followed by organization-wide training, department training, specific role training and continues throughout the tenure of the volunteer to keep them abreast of changes and trends or prepare them for promotion to new roles. Recognition of the importance of training staff to work with volunteers is growing. Recent legislation on the accessible provision of service to all people in Ontario necessitates the training of all personnel in the service sector including volunteers.

### **Adult Education Principles**

It is important to produce and deliver the best training possible. The underpinnings of training for adult volunteers are the principles of adult education. Adults are more likely to take a practical approach to learning, both in subject matter, methods of learning and outcomes, goals and measures. Adults are far more likely to want to test their newly acquired knowledge as they go along, and either delve deeper, or adjust their understanding and application of that knowledge. Once satisfied, adults will begin the process of generalizing new knowledge to relevant circumstances beyond the initial focus or experience.

Three key elements of adult learning need to be kept in focus while delivering adult education.

- Adults bring a lot of experience and knowledge with them to their educational experience. They have something to offer and something to lose.
- Adults prefer to focus on real life, immediate problems rather than on theoretical situations.
- Adults are accustomed to being active and self-directing.

Treat adult learners with respect. Allow for different styles and rates of learning. Encourage discussion and participation. Field “incorrect “ answers or observations as opportunities for discussion and learning. Rather than being the teacher with all the answers, try to be the facilitator who helps them to learn for themselves. Provide activities and interactive sessions throughout to allow for “learning by doing.” Focus on the immediate practical nature of the material being presented. Consider delaying delivery of materials that will not be used in the immediate future.

Take steps to ensure consistency across all trainers and locations. Using multiple and varying terms to describe the same material has the potential to be confusing. Assuring updates and changes are made to all sets of materials is critical. Have fun. Adults will detect very quickly if you are not engaged with your material.

## **Mandatory Training**

### *Health and Safety*

It is important to check with your Human Resources department to make sure volunteers receive all relevant legislated training. This will include health and safety training specific to the workplace and fire safety. Additional training and Personal Protective Equipment (PPE) will be required for certain environments or tasks. A record must be kept of all health and safety training. Consult with your health and safety representative for details on what must be noted in these records and where they are stored.

### *Accessibility for Ontarians with Disability Act (AODA)*

The Accessibility for Ontarians with Disability Act (AODA) was enacted as of January 2012 with the goal of “creating a province where every person who lives or visits can participate fully.” The Accessibility Standard for Customer Service applies to all organizations (public, private and nonprofit) that provide goods or services either directly to the public or to other organizations in Ontario and that have one or more employees in Ontario. Accessibility Standards include training for all staff and volunteers. Requirements vary according to the size of an organization. For details go to <https://www.ontario.ca/page/accessibility-laws>. <http://www.mcss.gov.on.ca/en/mcss/programs/accessibility/customerService/>—We recommend speaking with your Human Resources department, and other Volunteer Managers to see if accessing a pre-existing training package is available before creating your own from scratch.

## **Other Training**

### *Training Staff to Work with Volunteers*

Recent developments in the administration of volunteers include a growth in the understanding of the necessity of providing training to staff who will be working with volunteers. Training staff to work with volunteers achieves the following:

- Basic understanding of volunteer administration from the creation of job descriptions, to recruitment and placement, orientation and training, supervision and discipline, retention and recognition
- Basic understanding of the motivations of volunteers
- Expectations of volunteers
- Expectations of staff
- Basics in delegation and supervision

Many staff have limited or no understanding of the role of a volunteer within the organization. Some operate under assumptions and myths such as “volunteers should do anything they are asked” or “you can’t fire a volunteer.” Still others have little or no experience in delegation or supervision. If all involved are to have the best experience possible and enjoy working with each other, laying out the ground rules and providing resources and ongoing support is vital.

Some organizations have begun to include “working with volunteers” in their employee job descriptions and in performance evaluations. The provision of training specific to the working relationship supports both parties and ensures its ongoing success. For more information and resources on the topic of training staff to work with volunteers go to

[https://www.energizeinc.com/store/training\\_busy\\_staff\\_succeed\\_volunteers\\_complete\\_set](https://www.energizeinc.com/store/training_busy_staff_succeed_volunteers_complete_set)  
<http://www.bettystallings.com/55series/index.htm>

### *Ongoing Training*

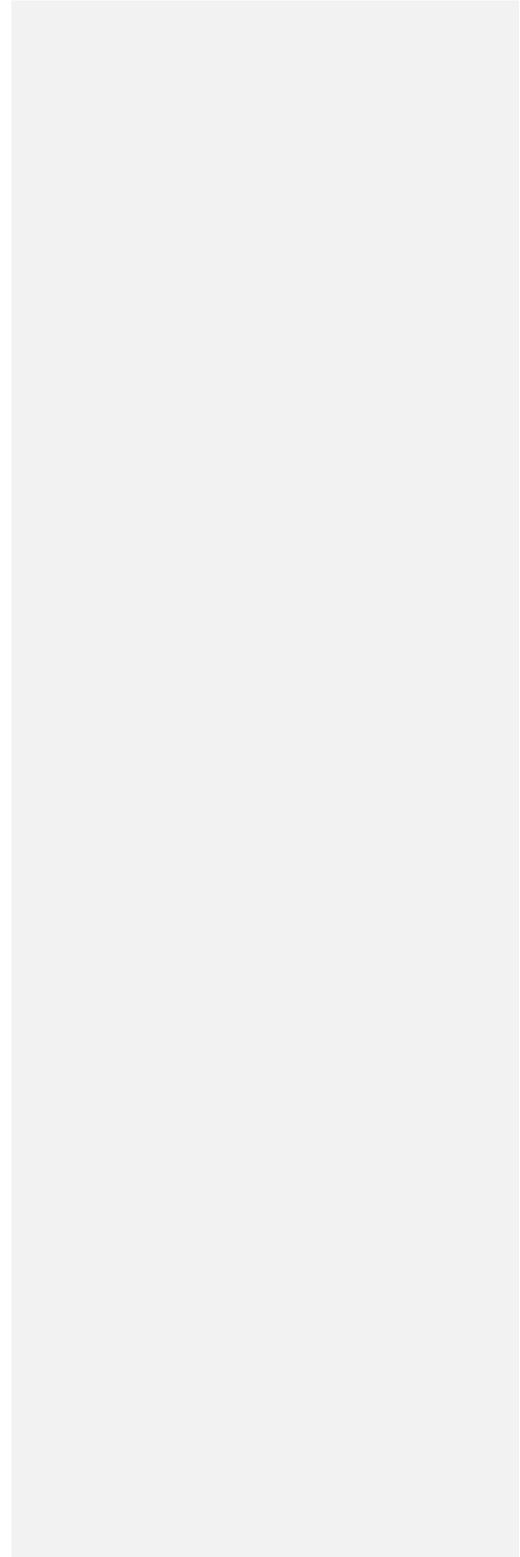
It is as important for volunteers as it is for staff to keep up-to-date on new information, materials, equipment and methods in the work place. Access to training is considered by some to be a benefit and reward of their volunteer service. These volunteers love to learn and might not otherwise have access to the training available at your organization. If at all possible, offer the opportunity for enhanced training to volunteers. It may turn out to be one of the easiest forms of appreciation on your list!

Below are some questions that will assist you to create procedures which clarify how volunteer training is completed in your organization.

- What are the necessary training materials? (These must be ready for new volunteers BEFORE they are recruited.)
- Are there different training tiers for different volunteer positions?
- Who oversees which training? Is the volunteer coordinator the only person providing training?
- What records are kept on completed training?
- Is there a skills test involved?
- What kind of feedback are volunteers asked for about training?
- Have the learning needs of new volunteers been identified?
- What are the learning objectives and desired outcomes?

- How is training consistency ensured?

**Q: Here, list your organization's training practices, including possible trainers and training materials:**



## Retention

### A. Evaluation

Volunteer Managers typify a culture of continuous improvement. It is vital to keep tabs on how everyone is doing and make adjustments on a daily, weekly, or monthly basis. Evaluation takes many forms and the level of formality depends on the environment and context of the volunteer work. A quick survey may be requested of event day volunteers, or a formal annual one-on-one evaluation may be done by a staff supervisor or Volunteer Manager on an annual basis.

Success is measured differently for different positions. For some positions being on time, in the appropriate clothing, with a positive attitude, ready to work is the absolute best thing a volunteer can do. For others, showing initiative, anticipating needs, showing leadership skills when they are most needed are indicators of success. Whatever the criteria or format, evaluating the successes and challenges of volunteers and providing them with feedback, suggestions and resources is an important task of the Volunteer Manager.

It is also vital for the Volunteer Manager to undertake regular evaluation of the Volunteer Program. Take the time to solicit feedback from volunteers, clients, staff and senior management. Take the feedback and audit the various components of the volunteer program and establish goals and strategies for improvement. Share this with senior management and ask for their support.

Pointers for Feedback:

- Volunteer performance feedback should not be reserved for formal evaluations, especially positive feedback
- Keeping records of volunteer performance, including hours, discipline, awards/recognition, makes for easier formal evaluation
- Ask volunteers to provide feedback on programs
- Remember, the details of a volunteer's performance evaluation are confidential

### B. Discipline

Despite careful efforts to recruit and select the best volunteers possible, occasions arise where the enforcement of policies and procedures, to protect clients and preserve workplaces, become necessary. Screening continues after a volunteer is hired. Volunteers can be dismissed, put on probation, or re-assigned at any time. In the interests of fairness, volunteers should be offered the same courtesies as staff when it comes to the investigation of breeches of policies, procedures and protocols. At the same time, the protection of vulnerable people and matters impacting health and safety may require taking immediate action. Protection of property and the preservation of the reputation of the organization with stake holders and the community are also matters that may require discipline or dismissal if a volunteer is acting inappropriately.

## Discipline

Below are some suggested practices related to discipline:

- Corrective action and discipline are most effective when a volunteer's performance is addressed as early as possible
- Documentation must be kept with observations and dates on a volunteer's unacceptable behaviour, as well as action taken
- An Incident Report (IR) is a great tool to track and document cases of policy infringement, accidents, or other irregular occurrences
- Depending on the severity and frequency of policy violations, the volunteer coordinator should consider:
  - Reviewing policies with the volunteer
  - Reviewing expectations with the volunteer
  - Receiving feedback from the volunteer about the position
  - Asking the volunteer if s/he would like to leave the assignment or the organization
  - Creating a mutually agreed upon plan of next steps (goals, regular reporting) with the volunteer co-signing
  - Re-instituting the probationary period
  - Subsequent and frequent follow-up
- Disciplinary action for volunteers should be outlined in the Volunteer Handbook. Here are some suggestions:
  - First offence: a verbal warning
  - Second offence: written warning, meeting with the volunteer coordinator and depending on the violation, a suspension from duties
  - Third offence: dismissal

## Dismissal

Below are some suggested practices related to dismissal:

1. Exit interviews should be conducted in a neutral place, anticipating strong emotions but remaining professional and sensitive.
2. Because in most cases, dismissed volunteers are simply not suited to the positions they are in, it is best to emphasize the position and not the person.

Here are some questions that will help shape dismissal policy:

- Have all incidents of policy violations or misconduct, as well as actions taken, been documented and reviewed?
- Has the volunteer been given the opportunity to respond?
- What other options have been considered as an alternative to dismissal?

- Is this decision consistent with other volunteer dismissals?
- Have organizational policies and procedures been consulted related to discipline and dismissal?
- Are you moving ahead at an appropriate pace?
- Has a statement been prepared to communicate dismissal to a volunteer?

## C. Recognition

Volunteer recognition is one of the liveliest and most prevalent topics of discussions among Volunteer Managers. Budgets are tight, windows of opportunity are often limited, and volunteers' opinions and preferences vary widely when it comes to recognition. The bottom line is different people volunteer for different reasons and want (or don't) different gestures of recognition for their work. Design a recognition program that offers a variety of options, including the option to opt out.

### Acknowledgement

The common denominator to all recognition is acknowledgement. The heart of recognition is the acknowledgement of the person's presence and the impact their presence has had on the people being served. Surveys reveal that the majority of volunteers appreciate being acknowledged when they arrive for their shift and a simple thank you when they are finished. Beyond this preference vary. Some volunteers do not like the spotlight and/or do not want the organization to spend money on gifts, honours, or social events. Others appreciate the thoughtfulness of a small token or the opportunity to celebrate and socialize in a relaxed atmosphere with staff and fellow volunteers.

### Options

The options are limitless. Here are some suggestions:

- Leave thank you cards out for clients or family members to jot down a note to volunteers
- Profile volunteers in your newsletter or community paper
- Include photos and stories on your website
- Send birthday or seasonal greeting cards (paper or electronic)
- Milestone awards for years of service
- Gift cards
- Annual lunch, dinner or awards banquet
- Coupons from local business exclusive to volunteers
- Branded items (t-shirts, pens, mugs)
- Volunteer week activities, tokens or treats
- Training or promotion
- Detailed articulation of specific impact volunteers had on helping the organization meet its mission
- Public thank you on social media (Facebook, Twitter, etc.)
- Photos of volunteers on organization website, newsletter or on social media

### **An Integrated Approach**

Some agencies' recognition programs reflect an integrated human resources approach. Organization sponsored appreciation events such as awards banquets include both staff and volunteers. The message being given is that both groups – paid and unpaid – make valuable contributions toward the mission of the organization and are equally valued.

A variety of websites offer suggestions, including <http://www.energizeinc.com/ideas.html>.

**Q: What is your organization's commitment to volunteer appreciation?**

**Q: List the volunteer appreciation options available to your volunteers?**

## Trends in Volunteer Management

### A. Population Trends - Four Generations in the Workforce

In her groundbreaking work, Dr. Linda Duxbury of Carlton University identified four generations in the work force and how their influences will shape the labour force (paid or unpaid). Each generation, from the Veterans, to the Baby Boomers, to Generation X, to the Nexus group, have different formative influences (watershed historical moments), core values (sense of right and wrong), and work values (job security). A shrinking labour force makes understanding and accommodation of these variances critically important to attracting and retaining people. The following is an abbreviated overview of the 4 generations and their attributes.

GENERATION	WATERSHED MOMENT	CORE VALUES	WORK VALUES
Veterans (pre-1947)	<ul style="list-style-type: none"> <li>• Stock Market Crash</li> <li>• “New Deal”</li> <li>• WW II</li> <li>• Atomic Bomb</li> <li>• Post War reconstruction</li> </ul>	<ul style="list-style-type: none"> <li>• Cautious</li> <li>• Self-sacrifice and deferral of reward</li> <li>• Build for better future</li> <li>• Black and white world view</li> <li>• Traditional and nostalgic</li> <li>• Deference to authority</li> </ul>	<ul style="list-style-type: none"> <li>• Loyalty</li> <li>• Dependability</li> <li>• Persistence</li> <li>• Hard Working</li> <li>• Wisdom over technical knowledge</li> <li>• Authoritarian</li> </ul>
Baby Boomers (1947-1964)	<ul style="list-style-type: none"> <li>• The Atomic Age, Cold War</li> <li>• Economic prosperity</li> <li>• Child-friendly culture</li> <li>• Assassinated American figures</li> <li>• Vietnam War</li> <li>• Birth control pill</li> <li>• Lunar landing</li> <li>• Rock and roll</li> </ul>	<ul style="list-style-type: none"> <li>• Optimism</li> <li>• Entitlement</li> <li>• Self-fulfillment</li> <li>• Non-conformist</li> <li>• Experimental</li> <li>• Objective sense of right and wrong</li> </ul>	<ul style="list-style-type: none"> <li>• Workaholic</li> <li>• Acceptance of stress</li> <li>• Team-oriented</li> <li>• Importance of title and status symbols</li> <li>• Demanding of respect and sacrifice of subordinates</li> </ul>
Generation X (1961-1974)	<ul style="list-style-type: none"> <li>• Economic recessions</li> <li>• Gov’t cutbacks and deficit</li> <li>• Anti-child society</li> <li>• Nuclear threat</li> <li>• Environmental deterioration</li> <li>• Personal computing</li> <li>• AIDS</li> <li>• Rap music</li> </ul>	<ul style="list-style-type: none"> <li>• Comfort with technology</li> <li>• Adaption to change</li> <li>• Pragmatism</li> <li>• Non-traditionalism</li> <li>• Acceptance of diversity</li> <li>• Confidence and self-reliance</li> <li>• Immediate gratification</li> </ul>	<ul style="list-style-type: none"> <li>• Work within the system</li> <li>• Sacrifice personal life for advancement</li> <li>• Close supervision</li> <li>• Goal achievement</li> <li>• Desire for job security</li> <li>• Insecure</li> <li>• Desire to be recognized</li> </ul>

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<p><a href="#">Nexus/Gen Y</a> (1975-1990s)</p>	<ul style="list-style-type: none"> <li>• Information technology</li> <li>• Internet</li> <li>• Child-focused society</li> <li>• Violence and terrorism</li> <li>• <a href="#">Gangsta rap</a></li> <li>• <a href="#">911</a></li> </ul>	<ul style="list-style-type: none"> <li>• Comfort with technology</li> <li>• Comfort with change</li> <li>• Street smart</li> <li>• Subjective view of reality</li> <li>• Optimism</li> <li>• Diversity</li> <li>• Globally connected</li> <li>• Networking</li> </ul>	<ul style="list-style-type: none"> <li>• Independence and autonomy</li> <li>• Challenge seeking</li> <li>• Variety seeking</li> <li>• Entrepreneurial</li> <li>• Distrust of hierarchy and authority</li> <li>• Continuous development of skills</li> <li>• Work life balance</li> <li>• Fun and communal workplace</li> </ul>
<p><a href="#">Millenials</a> (1996-2014)</p>	<ul style="list-style-type: none"> <li>• First African American President</li> <li>• Legalization of gay marriage</li> <li>• <a href="#">Climate change</a></li> </ul>	<ul style="list-style-type: none"> <li>• Diversity is the norm</li> <li>• Conservation,RRR</li> <li>• <a href="#">Mistrust of authority</a></li> </ul>	<ul style="list-style-type: none"> <li>• Motivated by meaning in work and in the workplace</li> <li>• Flexibility</li> <li>• Innovation</li> </ul>

A quick review of the influences that shape a generation and its values demonstrates the necessity for variation and flexibility in work organization, supervision, and reward wherever possible.

## B. Population Trends - Involving Volunteers from Culturally and Linguistically Diverse Background

According to background information cited in cultural competency materials from Investing in People and the Multicultural Council of Windsor and Essex County:

“Due to immigration trends, communities across Ontario have been transformed into tapestries of languages, customs, beliefs and races.

According to the 2006 Census of Canada (Statistics Canada).

- 28% of the Ontario population are Ontario born
- Over 200 ethnic origins are represented in Ontario
- 23% of the Ontario population are visible minorities
- 27% of the Ontario population reported having a mother tongue other than English and French

Community organizations need to ensure that they are representative and reflective of the communities they serve and that their programs and services are appropriate and relevant to the groups represented in their communities. To thrive in today’s increasingly diverse world, organizations must be able to effectively reach and engage individuals from various ethnic and cultural groups.”

Much work has been done by the government and nonprofit sectors to enhance the cultural competency of programs and services and much work remains. Several basic steps form the foundation of the cultural competency of any volunteer program. These are:

- Research – find out the major ethno-cultural groups in your community; seek out groups, associations and individuals who can help build a bridge to that community.
- Obtain or develop materials that describe the concepts and benefits of volunteering in Canada, the community and your organization in particular. Having these available in languages that reflect your community's profile is ideal.
- Design a strategy to get your materials into the hands of ambassadors and the various ethno-cultural groups in your community. Make the inquiry and application process as straight forward and inviting as possible.
- Seek out expertise, information and tool kits on cultural competency.

Make a commitment to continuous improvement in the evolution of your programs' inclusiveness of the ethno-cultural populations in your community.

### C. Corporate Volunteerism

The rise of corporate social responsibility brings corporate volunteerism to the forefront in many communities. Whether fielding requests from companies, or designing targeted recruitment strategies for specific skill sets some key considerations will help bring success to these relationships.

- **Values** – most companies will articulate their core values either informally or formally. Examine whether your organizations core values align with those of the company you are considering partnering with.
- **Outcomes** – seek clarification on the outcome the company is seeking. Outcomes may vary from providing a one time, time limited volunteer experience to the provision of a long term, deeper transformative learning experience. Find out if the company has specific expectations around team building or skills development.
- **Time frames** – assure a clear understanding of the date(s), time(s), and time-frame(s) that company volunteering takes place within. Some companies have a specific day of the year when all employees volunteer, others allow ongoing intermittent assignments, and still others offer longer term full time sabbatical programs.
- **Funding** – verify whether or not a financial contribution will accompany the volunteer time and what, if any, expectations it brings with it. Work closely with your fundraising staff drawing on their expertise in funding negotiations.
- **Recognition** - be clear about what, if any, recognition opportunities accompany the volunteering. Be prepared to enter into discussions about logo use, media coverage, client confidentiality, signage, etc. Some companies want little or no public recognition while others

integrate coverage of their community work into their overall public image profile and have specific goals they need to meet.

- **Growth** – be prepared for success. If all goes well, a deeper understanding of your organization's need and a recognition of the impact of volunteering on employees and your community may lead to a company's interest in broadening their involvement.

## **D. Family Volunteering**

In a child-centred, globally connected culture, parents are seeking opportunities to teach their children the value of participation and contribution to the community both at home and abroad. While opportunities that are feasible for younger children are less often available, it is still important to identify those that are available and make them known in the community. The combination of parents being able to model behavior, children learning by doing, and family traditions in volunteering being formed, creates an environment ripe for sustainable volunteerism in your community.

## **E. Online Platforms**

The proliferation of cloud-based technology brings with it endless opportunities for individual and group participation in volunteer contributions to the nonprofit sector. From finding mutually convenient meeting times using tools like Doodle, to compiling, co-producing, and storing files on Google documents, the platforms for people to connect and interact with your organization and participate in its work are creating newly emerging options every day. Keeping up with the technology can be challenging. Connect with those who have grown up with it, are comfortable with it, enjoy learning, applying, and sharing it – youth. Make connections with youth through your local volunteer centre, high school or post-secondary institutions with tech-based communications programs.

Online tools designed to meet the specific needs of volunteer programs are also now widely available. Scheduling programs have become more refined and more affordable as organizations take the plunge and provide feedback to the companies that produce them. Volunteers are responding positively to the availability of online registration, training, scheduling, and sign-in and time tracking. Keeping abreast of the advances in this type of technology is important to both the efficiency with which volunteer managers can do their job and the added convenience that appeals to volunteers who we are constantly seeking to attract and retain.

## Engaging Older Adults in Volunteering

*(The following is a summary of some of the content from the Engaging Mature Adults in Volunteering workshop presented September 14, 2021 as part of the New Horizon Project, a collaborative effort of Pillar Nonprofit Network, Over55, and the London and Area Association of Volunteer Administration.)*

Any discussion of the engagement of mature adults in volunteerism must be done within the context of the times we live in. Recognizing and respecting the humanity of each other is always the first step to creating healthy relationships with others. Building a volunteer program that is attractive to and inclusive of mature adults means building a volunteer program that is attractive to and inclusive of a broad range of citizens. Facilitating opportunities that bring together the needs of a nonprofit or charitable organization and the skills and experience offered by mature adults through volunteering requires a strategy that is founded on:

1. volunteer management best practices,
2. an understanding of the generational influences and traits revealed in the study and articulation of the different generations in the workforce,
3. addressing accessibility challenges of mature adults,
4. the application of targeted recruitment practices to this target group,
5. listening to the lived experience of mature adults who volunteer.

### 1. VOLUNTEER MANAGEMENT BEST PRACTICES Canadian Code for Volunteer Involvement

[The Canadian Code for Volunteer Involvement](#) was co-created by Volunteer Canada and the Canadian Administrators of Volunteer Resources (now [Volunteer Management Professionals of Canada](#)) in 2006 to provide a single code for volunteer engagement that is representative of both bodies. The Code was updated in 2012 and plans are in the works to revise the Code yet again to reflect changes and emerging challenges in volunteer management within Canada. The Code identifies standards that lead to a strong volunteer “culture and structure that supports and values the role and impact of volunteer involvement.” (p.6). The Canadian Code for Volunteer Involvement includes the following areas:

1. Mission-Based Approach
2. Human Resources Approach
3. Infrastructure for Volunteer Involvement
4. Evaluation: Tracking, Measuring and Reporting

5. Volunteer Roles and Recruitment
6. Risk Management
7. Screening
8. Orientation and Training
9. Support and Supervision
10. Recognition: Valuing Volunteer Involvement

It is up to each individual organization to assess its program and work toward adherence to the code in a fashion that suits the organization and meets the intention of the various aspects of the code. Using the code as a foundational piece of volunteer programs helps to ensure volunteers have meaningful experiences and make meaningful impacts on mission delivery and people who are served.

## 2. DIFFERENT GENERATIONS IN THE WORKFORCE

Research into the different generations in the workforce has been ongoing for several years. The purpose of this work is to shed a light on how major historical conditions and events influences each generation’s values, especially those around work. The application of this research is not to use it to stereotype people but rather to establish there may be differences between the generations, and those differences need to be acknowledged and integrated into how work gets accomplished within any given environment.

Generation	Watershed Moment/Economics/Tech	Traits
<b>Veterans Born 1945 and before</b>	Stock Market Crash WW II Post-War reconstruction	Loyalty & Dependability Persistence & Hard Working Wisdom over tech knowledge Authoritarian
<b>Baby Boomers Born 1946 to 1964 (largest cohort)</b>	Economic prosperity Child-friendly culture Cold War/Communist threat Lunar landing/ Birth Control pill Vietnam war Rock and roll	Workaholic/Stressed 80s Wall St. Team-oriented Importance of title/status symbols Demanding of respect and sacrifice of subordinates
<b>Generation X Born 1965 to 1976</b>	Economic recessions/Stagflation AIDS Nuclear threat Environmental deterioration Personal computing Rap music	Working within the system Sacrifice personal life for advancement Dependent on close supervision Dedicated to goal achievement Desire for job security

<b>Generation Y Born 1977 to 1995</b>	Information technology Internet and cellphone Downsizing and outsourcing Child-focused society Violence and terrorism Gangsta rap	Independence and autonomy Challenge/Variety-seeking Entrepreneurial Distrust hierarchy and authority -Lack of loyalty/commitment Work-Life balance, Fun and communal workplace
<b>Millennials Born 1996 to 2014</b>	Tech dependent Internationally connected Diversity is the norm Sept 11/ First African American President	More likely to have debt – education or access to credit Less likely to own a car, television, or home Motivated by meaning in work Task not time oriented in work

Adapted from the work of [Dr. Linda Duxbury](#), Sprott School of Business, Carleton U.

### 3. ADDRESSING BARRIERS

Research by Volunteer Canada and published under the title ‘Volunteering and Older Adults Final Report 2013’, identified 10 primary barriers mature adults encountered in their attempts to volunteer. These include location, transportation, scheduling, length of commitment, caregiving responsibilities, language, and culture, changing abilities, comfort with technology, access to information about volunteering, negative volunteer experiences in the past. The abbreviated findings were as follows:

- A. Location – With more emphasis on neighbourhood development and locally driven solutions, more people are interested in volunteering close to home to have a direct impact on their environment; therefore, proximity to home or work is a factor. After the amalgamation of cities and public agencies, many smaller organizations have followed this trend and finding a volunteer opportunity close by can be a challenge. Safety and security are also important considerations. To save on rent, many organizations have moved their facilities to isolated or industrial areas and these can be less comfortable for older adults, especially if they are volunteering and attending meetings in the evenings. While most jurisdictions have legislation requiring public services to be in physically accessible buildings, this is still not consistent in all provinces and territories. These challenges of location can create a barrier for older adults or anyone with mobility issues.
- B. Transportation – Some form of transportation to volunteer activities is required. Lack of access to transportation in terms of availability, costs, physical accessibility, and parking can also be a challenge or barrier, whether it is public transportation, adapted transportation, or personal transportation. For those older adults who are no longer driving a car but have not yet adapted to alternate transportation modes, this can be

both a practical and emotional challenge, as it may relate to notions of independence. These factors can create a barrier to participation.

- C. Scheduling – Many older adults require a flexible schedule to accommodate travel, health issues, medical appointments, and other seasonable circumstances.
- D. Length of Commitment - Current trends in volunteering are indicating that baby boomers are seeking shorter-term volunteer assignments.
- E. Care Giving Responsibilities – Many baby boomers and seniors are the primary care giver to parents, partners, or grandchildren. The availability and costs of care-giving or respite care can be a barrier to participation.
- F. Language and Culture – Some organizations have systemic barriers to participation in terms of language and culture. People want to feel welcome, comfortable, and informed in a non-profit organization.
- G. Changing Abilities – As abilities change, there may be the need for accommodation in terms of the location as well as the volunteer position or assignment. It is not always comfortable to ask for these accommodations whether one is a long-time volunteer or just now considering getting involved.
- H. Comfort with Technology – Depending upon a person’s work experience and comfort with technology, new technology that is used to sign in or to carry out the volunteer assignment may be intimidating.
- I. Access to Information about Volunteering – Some individuals may lack awareness about volunteer opportunities in the community. Many older adults, particularly if there has been a recent change in employment status, residence, or household make-up, find it difficult to find a volunteer opportunity that suits their new circumstances.
- J. Negative Volunteer Experiences in the Past. – A telephone survey of more than 1000 households revealed that 68% of people had a negative volunteer experience in the past. When asked more about what made these experiences negative, people identified politics, lack of organization, and lack of appreciation as the top three reasons.

The strategies we develop to address these barriers must be incorporated into our volunteer programs in a way that makes it apparent to all applicants that the organization is ready and able to address accessibility issues to the best of its ability. We must also respect that some mature adults may not be good candidates for some specific roles. Identifying the conditions under which a volunteer role must be executed will assist mature adults in assessing whether they are a good fit or not.

### [Accessibility](#)

Developing a more accessible organization will help to attract not only mature adults but a variety of people with accessibility challenges. Many nonprofits in Ontario have participated and trained staff and volunteers in accessibility standards for customer service (ADOA). The

government of Ontario also offers Integrated Accessibility Standards which include a review of transportation modes and how they integrate (or don't) with an organization's physical space. This document also includes a review of signage accessibility (location, size, height etc.).

Another important step in creating accessibility that is public facing and a demonstration of your organization's and its volunteer program's commitment to accessibility is the accessibility of your social media including your website and other audio-visual materials. This includes information about volunteering and volunteer training materials and delivery. Did you know that PowerPoint has an accessibility checker, or that using the Heading structure within Word provides an easier 'reading' experience for those using screen readers? For more great resources go to [Ontario.ca/AccessON](https://Ontario.ca/AccessON).

#### **4. TARGETED RECRUITMENT**

The ability to execute targeted recruitment successfully begins with a thorough understanding of a volunteer role. This understanding can be elucidated through the process of developing a role description. This includes tasks, responsibilities, risks, risk mitigation strategies, skills and qualifications, and benefits to the volunteer. Being as detailed as possible will help to build the profile of the person who will be the ideal candidate for the role. Be sure to include the specific abilities that are required like standing, sitting (and for how long), lifting (how much weight), visual acuity, language proficiency and so on.

Once the role description is complete the next step is to consider where you will find the people with the skills, abilities, experience, qualifications that are required. In the case of mature adults consider if workplaces, unions, and professional associations have retiree or alumni groups associated with their organizations. Places like senior centres or other informal gathering places for mature adults are a source for advertising volunteer opportunities but will provide a broader and less specific group of candidates.

#### **5. LIVED EXPERIENCE**

In 2021 [Over55](#) conducted a series of focus groups with mature adults from the London community and volunteer engagement professionals who were members of the London and Area Association of Volunteer Administrators. The input gathered from these sessions informs a new set of courses that will assist mature adults who are looking to volunteer in the community. Among the topics covered will be resume writing or refreshing, navigating Police Checks or other screening activities. These topics complement O55's current offerings on Senior Hub which now includes courses and videos on current popular culture including social media, as well as support for employment and entrepreneurship for mature adults.

As part of the New Horizons Project workshop on Engaging Mature Adults in Volunteering, we heard from a panel of mature adult volunteers who reminded us that it is often the meaningful connections with people that attract them and keep them motivated to continue with volunteer work. The connection can be with a staff person who is passionate about the work of their organization, or with a person who is the benefactor of the volunteer's time and skill that provides its own intrinsic reward. The type, time, and place volunteers became involved in the community was often tied to life events and stages. For example, volunteering may begin with the aim of gaining a sense of connection and belonging in a new community or country, transition over to volunteering for children's schools or sport activities once they have children, and change once more when children are grown and building a life of their own. We were also reminded that making assumptions about immigrants who approach us about volunteering can be demeaning and discouraging. Some of these assumptions include immigrants do not know how things work in Canada, they are unskilled, or will have language barriers. We must greet each person who contacts us about volunteering with an open heart and mind, and work to discover what they have to offer and where and how they might best offer it our community.

#### RESOURCES

- [Over55](#)
- [Pillar Nonprofit Network](#)
- [London and Area Association for Volunteer Administration \(LAVA\)](#)
- [Volunteer Canada](#)
  - [Transitions, Milestones, and Legacies: Retirement Planning Module on Volunteering](#)
  - [Volunteering and Older Adults Final Report 2013](#)
- [Canadian Code for Volunteer Involvement](#)

## Administrative Tasks and Tools

### A. Records

It is critical to ensure that appropriate and accurate documentation is kept to support volunteer involvement reviews, disciplinary actions and legal requirements.

Below are lists which will assist your organization to create record-keeping policies and maintain a solid record-keeping system.

#### 1. Legislation:

- a. Personal Information Protection and Electronics Documents Act  
<https://www.priv.gc.ca/en/privacy-topics/privacy-laws-in-canada/the-personal-information-protection-and-electronic-documents-act-pipeda/>
- a. Act
- b. [www.privecom.gc.ca/legislation/02-06-01-01\\_e.asp](http://www.privecom.gc.ca/legislation/02-06-01-01_e.asp)
- b. Canadian Human Rights Code
- e. <https://laws-lois.justice.gc.ca/eng/acts/h-6/page-1.html>
- [www.laws.justice.gc.ca/en/showdoc/cs/h-6///en?page=1](http://www.laws.justice.gc.ca/en/showdoc/cs/h-6///en?page=1)
- c. Accessibility for Ontarians with Disabilities Act  
<https://www.ontario.ca/page/about-accessibility-laws>
- d. [www.mess.gov.on.ca/mess/english/pillars/accessibilityOntario/what/AODA\\_2005.htm](http://www.mess.gov.on.ca/mess/english/pillars/accessibilityOntario/what/AODA_2005.htm)

#### 2. Personnel files may include:

- a. Personal data (full name, address, telephone number)
- b. Emergency contact information (once the volunteer is accepted)
- c. Pertinent medical or health information (if applicable and once the volunteer is accepted)
- d. References
- e. Start date, end date, dates of leaves of absence
- f. Records of orientation and training
- g. Records of testing
- h. Records of assignments
- i. Records of hours
- j. Records of performance reviews
- k. Records of recognition
- l. Copies of Incident Reports involving the volunteer
- m. Signed forms:
  - i. Code of Conduct agreement
  - ii. Photographic waivers

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iii. Discipline-related forms

3. Time logs may include:
  - a. Hours each volunteer has contributed in specific time increments
  - b. Hours contributed in each position
4. Activity logs may include:
  - a. Supplies used
  - b. Incident Reports filed
  - c. Client concerns brought to a volunteer

It is critical that the Volunteer Manager maintain the confidentiality and the privacy of this information. Below are some questions which will guide your organization to create and solidify record-keeping practices.

1. What information is included in volunteer records?
2. Who is responsible for maintaining volunteer records?
3. Who has access to them and on what conditions?
4. Where are records kept?
5. How are new records created?
6. How long are records kept?

## **B. Volunteer Administration Forms**

- A. Volunteer Screening Checklist
- B. Volunteer Application
- C. Volunteer Interview
- D. Volunteer Reference Check
- E. Volunteer Emergency Contacts
- F. Volunteer Confidentiality Agreement
- G. Volunteer Orientation and Training Log
- H. Volunteer Time Log
- I. Volunteer Evaluation
- J. Volunteer Experience Evaluation
- K. Volunteer Exit Interview
- L. Incident Report

**Customize these forms to suit your organization's volunteer program needs by adding your organization's logo, stylized text, additional or fewer questions, and adapted content.**

**VOLUNTEER SCREENING CHECKLIST**

Volunteer Name	
Position Title	

Documents Received	Date	Documented By
Application Form – completed		
Volunteer Position Description – provided and/or reviewed		
Interview – attach form		
Satisfactory Reference Check 1 – attach form		
Satisfactory Reference Check 2 – attach form		
Release Form – signed		
Code of Conduct – signed		
Confidentiality Agreement – signed		
Photographic Waiver – signed		
Valid Criminal Records Check		
Valid Driver’s License – attach photocopy of original		
Driver’s Abstract		
Medical - attach		
Other (specify) :		
Other (specify) :		
Other (specify) :		



### VOLUNTEER INTERVIEW FORM

Date	
Volunteer Name	
Position Title	
Interviewer	

1. What motivated you to volunteer with our organization?
2. What do you know about our organization?
3. What do you expect to learn and accomplish from this experience?
4. What skills, training or experience do you have that may be useful to this position?
5. When and for how long are you available to volunteer?
6. In previous volunteer experiences, what did you enjoy the most? What did you enjoy the least?
7. Do you have any questions about volunteering with our organization?
8. Additional questions asked:
9. Additional comments:

*Remember to use open-ended, behaviour-based questions when probing for skills, techniques and attitude. For example, "Tell me about an occasion when you encountered an angry client/customer and how you handled the situation?"*

**VOLUNTEER REFERENCE CHECK FORM**

Date	
Volunteer Name	
Reference Name	
Relation to Volunteer	

Please rate the applicant on the following qualities (1 = poor, 5= excellent)

Reliability	1	2	3	4	5
Ability to perform and complete tasks	1	2	3	4	5
Interpersonal skills with adults	1	2	3	4	5
Interpersonal skills with children	1	2	3	4	5
Problem solving skills	1	2	3	4	5
Leadership skills	1	2	3	4	5
Responsibility	1	2	3	4	5
Acceptance of guidance and supervision	1	2	3	4	5

1. How long have you known the applicant?
2. In what capacity?
3. Would you re-hire the applicant? Why or why not?
4. How does the applicant work individually?
5. How does the applicant work in a group?
6. Additional comments about the volunteer:

Please indicate the level of confidence you have in this applicant as related to the volunteer position.

- Very Confident     
  Confident     
  Apprehensive     
  Do not know

Recorded by \_\_\_\_\_

Date \_\_\_\_\_

**VOLUNTEER EMERGENCY CONTACTS**

Date	
Volunteer Name	
Supervisor	

Name	Relation to Volunteer	Telephone

<b>Emergency Medical Information</b> Information to be shared with emergency medical personnel.
<b>Allergies</b>
<b>Pre-existing Conditions</b>
<b>Medications</b>

All information will be held in strictest confidence and stored in accordance with PIPEDA standards.

### VOLUNTEER CONFIDENTIALITY AGREEMENT

I \_\_\_\_\_ (*please print name*) acknowledge that I am aware that some of the information that I will handle or have access to in the course of my work as a volunteer with X organization is confidential.

I will not disclose, communicate or allow to be disclosed, directly or indirectly to any person who does not require such information in the course of their duties with X organization, any private or confidential information whatsoever, obtained by me in or about the performance of my duties or by virtue of the position or employment as an employee, or placement volunteer with X organization.

I will not allow any person or persons not entitled by law to such information, to inspect or have access to any written statement, departmental record, roll, correspondence, plan, computerized record, document or any other paper of a private or confidential nature, and I will conscientiously endeavour to prevent any person or persons not entitled from inspecting or having access to any such confidential information.

---

Signature

---

Date

*Some organizations choose to attach a copy of their confidentiality policy to a form. The form goes on file with the organization and the policy stays with the volunteer.*

**VOLUNTEER ORIENTATION AND TRAINING LOG**

Volunteer Name	
Supervisor	

<b>Date (dd/mm/yy)</b>	<b>Orientation/Training</b>	<b>Specifics/ Notes</b>	<b>Received/ Completed?</b>	<b>Supervisor Initials</b>
	Volunteer Handbook			
	Orientation session			
	Meeting with Volunteer Manager			
	General Health and Safety Training			
	Specialized Health and Safety Training			
	Role specific training			
	Shadow/Mentor Volunteer Assigned			
	Staff Supervisor Assigned			
	Other			
	Other			



**VOLUNTEER EVALUATION FORM**

**I.**

Name of volunteer	
Title of assignment	
Program	
Name of supervisor/evaluator	
Length of volunteer service	

**II. Tasks Performed** (Refer to assignment/job description)

Please write what the specific assignments of the volunteer are and a brief statement on how well the volunteer performs those assignments. Comment on what the volunteer does well and what areas, if any, may need improvement.

**III. Other Observations**

A. Reports for assignments on time:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
B. Reports for assignments on time:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
C. Calls in if late or unable fulfill commitment:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
D. Follows instructions:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
E. Takes initiative:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
F. Accepts responsibility:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.

G. Has good rapport with clients:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
H. Is cooperative with staff:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
I. Is cooperative with other volunteers:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
J. Accepts supervision:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
K. Appropriately attired:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
L. Seems to enjoy volunteer assignment:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
M. Gives good quality volunteer service:	<input type="checkbox"/> Yes <input type="checkbox"/> No	If no, please comment.
N. Is consideration being given to reassignment for a better fit or for promotion to more responsibility and/or leadership?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Please comment.

**IV. Volunteer Comments:**

_____	_____
<b>Volunteer Signature</b>	<b>Date</b>
_____	_____
<b>Supervisor Signature</b>	<b>Date</b>

**VOLUNTEER EXPERIENCE EVALUATION**

**I.**

Program	
Name of volunteer	
Name of supervisor	
Length of volunteer service	

**II.**

A. Do you feel that your volunteering contributes to our client's well being? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, please comment.
B. Do you feel the supervision you receive is sufficient? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, please comment.
C. Do you believe the staff thinks your volunteer contribution is important? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, please comment.
D. Do you think the clients appreciate what you do as a volunteer? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, please comment.
E. Did you receive enough training from the staff to successfully complete your assignments? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, please comment.
F. What do you enjoy most about your volunteer assignment?
G. What do you least enjoy and/or find frustrating about your volunteer assignment?
H. What can the volunteer services department do in order to make volunteering an even more enjoyable experience for you?

_____	_____
<b>Volunteer Signature</b>	<b>Date</b>
_____	_____
<b>Supervisor Signature</b>	<b>Date</b>

### VOLUNTEER EXIT INTERVIEW

Date	
Name of Volunteer	
Position(s)	
Start Date	
Interview/End Date	
Reason for Leaving	

1. What did you find most rewarding or like best about volunteering at X organization?
2. What challenges did you face while volunteering at X organization?
3. What contributions do you feel that you made to X organization?
4. Was your orientation sufficient? Are there any suggestions for improvement?
5. Do you believe that you received sufficient training for your role? Is there any additional training you would suggest?
6. Did you receive enough on-going feedback and support while you were volunteering?
7. Would you want to be a volunteer here again?
8. Any other comments or suggestions?

### INCIDENT REPORT

Complete this form to report any incidents of on-site accidents or incidents resulting in personal injury, property damage or conflict. Please complete and submit Incident Reports within two days of the incident occurring. Details of all Incident Reports are confidential.

Name of person completing the form:	
Date of incident:	Time:          am/pm
Location of incident:	Other persons present at the time:

Describe the incident:	
What was the cause of the incident?	
Were any injuries sustained? <input type="checkbox"/> Yes <input type="checkbox"/> No	Was an ambulance called? <input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, name of injured person(s):	
Details of injuries:	First aid or treatment administered:
Was any property or equipment damaged? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, details of damage:	
What action did staff or volunteers take, if any, to address the situation <b>during</b> the incident?	
What action will be taken to prevent something similar from happening again?	
Was the incident immediately reported to the on-site supervisor (aside from this Incident Report)? <input type="checkbox"/> Yes <input type="checkbox"/> No	

Signature

Date

## Resources

### National

- Volunteer Canada, [www.volunteer.ca](http://www.volunteer.ca)
- Imagine Canada, [www.imaginecanada.ca](http://www.imaginecanada.ca)
- Charity Village, [www.charityvillage.ca](http://www.charityvillage.ca)
- ~~Volunteer Management Professionals of Canada, Canadian Administrators of Volunteer Resources, <https://www.vmpc.ca/> <http://cavrcanada.org>~~

### International

- United Nations Volunteers, <http://www.unv.org>

### Provincial

- Provincial Association for Volunteer Resources, [www.pavro.on.ca](http://www.pavro.on.ca)
- Government of Ontario (AODA), <https://www.ontario.ca/page/accessibility-laws>  
[www.mcss.gov.on.ca/en/mcss/programs/accessibility/customerService/](http://www.mcss.gov.on.ca/en/mcss/programs/accessibility/customerService/)

### Local

- London and Area Association for Volunteer Administration, [www.londonava.com](http://www.londonava.com)
- Pillar Nonprofit Network, [www.pillarnonprofit.ca](http://www.pillarnonprofit.ca)

### Consulting Sites

- Corporate Volunteerism, [www.realizedworth.com](http://www.realizedworth.com)
- ~~Volunteer Management, [www.bettystallings.com](http://www.bettystallings.com)~~
- Energize, [www.energizeinc.com](http://www.energizeinc.com)
- Windsor Multiculturalism Council,  
[www.themcc.com/content/welcoming-communities-initiative-wci](http://www.themcc.com/content/welcoming-communities-initiative-wci)

### Tools

- Online meeting date selection tool, <http://doodle.com>