

Ontario Community Support Association
Association ontarienne de soutien communautaire

Managing Volunteer Resources:

Policies and Procedures for Community Agencies

Copyright © 2000 by Ontario Community Support Association

ALL RIGHTS RESERVED. No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission of the publisher.

Cover by Richard English.

Copies of this publication may be purchased from:

Ontario Community Support Association
970 Lawrence Avenue West, Suite 104
Toronto, ON M6A 3B6

(416) 256-3010
1-800-267-OCSA (6272)
Fax: (416) 256-3021

ocsainfo@ocsa.on.ca
www.ocsa.on.ca

Canadian Cataloguing in Publication Data

Main entry under title:

Managing volunteer resources : policies and procedures for community agencies

ISBN 0-9684329-3-X

1. Voluntarism—Management. I. Ontario Community Support Association.

HV40.42.M35 2000 361.3'7'0683 C00-900008-9

Note: Volunteer management is an evolving and complex field. Each agency will need to customize its policies and procedures to its specific needs and situations. The enclosed policies and procedures have not been reviewed for their legality. It is expected that each agency will have legal advisors review its specific policies and procedures.

Acknowledgments

The development of the Volunteer Management Policies and Procedures was made possible through the contribution of many individuals and agencies.

The project was funded by the Ministry of Health, Health Care Programs.

This document would not have been possible without the hard work, enthusiasm and expertise of the members of the Volunteer Management Working Group. The members were:

- ▶ Barbara Bowie, The Dorothy Ley Hospice, Etobicoke (representing Hospice Association of Ontario)
- ▶ Denise Charles, Halton Helping Hands
- ▶ Joyce Cross, volunteer
- ▶ Barbara Buckspan, Volunteer Centre of Toronto
- ▶ Sharron Regan, CHATS, York Region
- ▶ Laurie McClure, St. Lawrence Recreation Center, Toronto (representing PAVR-O¹)
- ▶ Mary-Lynn Koekkoek, Senior Citizens Council, Peterborough

Lorrie Hathaway, Volunteer Centre of Toronto also provided valuable expertise.

Special thanks to the agencies which pilot tested the draft policies and procedures and suggested changes. The representatives from the agencies were:

- Valmay Barkey, Community Care Victoria County
- Becky Johnson, Lambton Elderly Outreach
- Mae Radford, Meals on Wheels, VON, Hamilton-Wentworth
- Marg Somerville, St. Elizabeth Nursing, Hamilton

Appreciation is also extended to Mary Davies whose commitment to the consultative process and enthusiasm has resulted in this excellent resource for Community Support Service agencies.

The Generic Volunteer Management Policies and Procedures are the result of the creative work of many individuals. We have attempted to acknowledge the work of others in the development of these policies and procedures. This document would not have been possible without their work. It is hoped that the policies and procedures will assist the community support sector in providing high quality services to its clients.

¹

PAVR-O is the Professional Administrators of Volunteer Resources - Ontario.

Table of Contents

Page Number

| | | |
|---|------------|-----------|
| Background Information to the Development of Volunteer Management | | 1 |
| Policies and Procedures | | 1 |
| Steps in the Development of Policies and Procedures | | 1 |
| Sources of Information | | 1 |
| Importance of Volunteer Management | | 2 |
| Principles for Effective Volunteer Management Policies and Procedures | | 2 |
| Definition of a Volunteer | | 3 |
| Definition for Manager of Volunteers | | 3 |
| Philosophy Regarding Volunteers in the Agency | | 3 |
| Special Types of Volunteers | | 3 |
| Use of Term Paid Staff | | 4 |
| Use of Other Terms | | 4 |
| Expected Use of the Generic Policies and Procedures | | 4 |
| Page Numbering | | 4 |
| | | |
| I. Volunteer Program Policies | | 5 |
| Designated Manager of Volunteers | VM-I-10 | 5 |
| Evaluation of Volunteer Programs | VM-I-20 | 6 |
| Provision of References | VM-I-30 | 7 |
| | | |
| II. Code of Conduct Policies | | 8 |
| Confidentiality of Information | VM-II-10 | 8 |
| Conflict of Interest | VM-II-20 | 9 |
| Representing the Agency | VM-II-30 | 10 |
| Dress Code and Conduct | VM-II-40 | 11 |
| Acceptance of Gifts | VM-II-50 | 12 |
| Alcohol and Drugs | VM-II-60 | 13 |
| Smoking | VM-II-70 | 14 |
| Handling of Funds | VM-II-80 | 15 |
| Multicultural/Anti-racism | VM-II-90 | 16 |
| Harassment | VM-II-100 | 17 |
| | | |
| III. Management Cycle Policies | | 21 |
| Recruitment | VM-III-10 | 21 |
| Screening | VM-III-20 | 23 |
| Exclusion of Applicants | VM-III-30 | 25 |
| Probation | VM-III-40 | 26 |
| Orientation and Ongoing Education/Training | VM-III-50 | 27 |
| Support, Supervision and Performance Review | VM-III-60 | 29 |
| Recognition of Volunteers | VM-III-70 | 31 |
| Retention of Volunteers | VM-III-80 | 32 |
| Resignation | VM-III-90 | 33 |
| Discipline/Dismissal | VM-III-100 | 34 |
| Appeal Process | VM-III-110 | 37 |

Table of Contents (cont.)

Page Number

| | | |
|---|----------|----|
| IV. Other Agency Specific Policies | | 39 |
| Fraud and Theft | VM-IV-10 | 39 |
| Vacation/Leave of Absence | VM-IV-20 | 40 |
| Reimbursement | VM-IV-30 | 41 |
| Insurance for Driving | VM-IV-40 | 42 |
| Mandatory Volunteers/Special Case | | |
| Volunteers | VM-IV-50 | 43 |

Appendix A. Qualified Manager of Volunteers

Appendix B. Sample of Community Care Victoria County’s Policies and Procedures

Background Information to the Development of the Generic Volunteer Management Policies and Procedures

Steps in the Development of the Policies and Procedures

The process for the development of the policies and procedures included the following steps:

- A. The Working Group members:
 1. Reviewed the Ontario Community Support Association's Draft Management of Human Resource Standards to identify areas for development of policies and procedures.
 2. Identified additional key policies and procedures which were required.
 3. Agreed to write specific policies and procedures.
 4. Researched what their own agency and other agencies/organizations had developed.
 5. Developed draft policies and procedures.
 6. Revised the policies and procedures based on comments made by other members of the Working Group.
- B. Four agencies pilot tested the draft policies and procedures and suggested changes.
- C. The Working Group members finalized the draft policies and procedures based on the feedback from the agencies who completed the pilot testing.

Sources of Information

The members developed the policies and procedures based on those developed for their own organizations, agencies they contacted and information adapted from the following main sources:

- Graff, L. *By Definition: Policies for Volunteer Programs*. Toronto: Volunteer Ontario, 1993.
- Hawthorne, N. *Sample Volunteer Program Procedural Manual*. CyberVPM.com.
- Ontario Community Support Association. *Standards and Indicators for Community Support Services: The Guide to Quality Care*. Toronto: Ontario Community Support Association, 1999.
- Street, L. *Screening Handbook*. Ottawa: Canadian Association of Volunteer Bureaux and Centres, 1996.
- Volunteer Ontario. *Screening Volunteers and Employees Providing Direct Service to Vulnerable Individuals Through Police Records Checks*. Toronto: Volunteer Ontario, 1995.

Importance of Volunteer Management

The Working Group believes there needs to be stronger recognition of and support for Volunteer Management. Examples of recent changes in volunteering which reinforce the need include:

- increase of clients with more complex care needs
- aging population
- increased cultural diversity of the population, including both volunteers and clients
- increase in safety issues for clients e.g. physical and psychological which result in increased concerns about litigation
- new definitions of who is a volunteer
- changing roles for volunteers
- changing expectations of volunteers
- changing motivation of volunteers
- changing availability of volunteers (i.e. length of service and hours available)
- increasing skill sets of volunteers
- lack of sufficient paid staff to supervise volunteers (e.g. 1 agency has 320 volunteers supervised by one paid staff)
- crisis of insufficient funding for volunteer programs
- increasing reliance on volunteers due to agencies' limited resources.

Principles for Effective Volunteer Management Policies and Procedures

The following principles are fundamental to effective Volunteer Management policies and procedures:

1. Initial and ongoing education of the Board of Directors, paid staff and volunteers on the need, value and requirements of the volunteer program.
2. Support and recognition of the need, value and requirements of the volunteer program by the Board of Directors and the Executive Director (e.g. need for: qualified Manager of Volunteers; risk management; ongoing screening; and, adequate budget).
3. Sufficient funding to support the professional staffing of a strong and viable volunteer program.
4. Hiring of a qualified Manager of Volunteers (see Appendix A including knowledge of risk management and screening).
5. Approval of Volunteer Management policies and procedures by the Board of Directors. (Note: The Manager of Volunteers is responsible for “making a case for the volunteer program”.)

Definition of a Volunteer

A volunteer is a person who by choice and without financial compensation² contributes time and service to assist in fulfilling the mission of the agency.³

Definition for Manager of Volunteers

The Manager of Volunteers is the supervisor or director who is responsible for managing volunteer resources. It is recognized that in many agencies, volunteer management may be one component of a person's responsibilities.

Philosophy Regarding Volunteers in The Agency

1. Volunteers are valued and respected by everyone in the agency. The agency actively seeks the volunteers' input on programs, policies and procedures and agency concerns.
2. As representatives of the community-at-large, volunteers actively participate at all levels of the agency, ensuring that services are responsive to the needs of the clients.
3. Volunteers enhance the services provided and do not assume duties of paid staff.
4. Volunteers act as representatives of the agency. The extent of their relationships with the clients is outlined in their position descriptions. Training and supervision is provided to ensure volunteers understand their roles, responsibilities and limitations and are able to undertake them in an appropriate and safe manner.

Special Types of Volunteers⁴

1. **Paid employees** may be volunteers within the agency provided their role is outside the scope of their paid work and takes place outside of their usual working hours. Paid staff must be registered as active volunteers, subject to the expectations and limitations of a written position description.
2. **Clients may be volunteers** within the agency provided their role is outside the scope of the services provided to them. They may be accepted as volunteers in roles within the scope of the service, ___ weeks after being discharged from the specific service. (*Each agency will need to put in the weeks appropriate for its agency*)
3. When volunteers are performing roles which require skills that are licensed or

² It is recognized that an agency may reimburse volunteers for out-of-pocket expenses (e.g. travel, parking).

³ Adapted from American Red Cross definition stated in Linda Graff. *By Definition: Policies for Volunteer Programs*. Etobicoke: Volunteer Ontario, 1993, p.24.

⁴ Adapted from information in Linda Graff. *By Definition: Policies for Volunteer Programs*. Etobicoke: Volunteer Ontario, 1993.

professionally regulated, each agency needs to clearly outline its policies and procedures regarding the scope of the role.

4. **Volunteers in unionized settings** will:

- not be utilized to perform “bargaining unit work”
- not fill paid staff positions
- not assume a role of paid staff when there is an industrial conflict (e.g. strike, work to rule)
- have full labour approval if they are required to cross a picket line
- have the right to choose not to fulfill their volunteer role in the event of an industrial conflict.

Use of Term Paid Staff

Many of the volunteer policies and procedures are also applicable to paid staff. Therefore, the term “paid staff” is included where appropriate in the policies and procedures.

Use of Other Terms

The use of terms such as “Executive Director” and “Manager/Supervisor” will vary with the agencies. This document uses the terms “Manager of Volunteers” and “Supervisor of Paid Staff”.

Expected Use of the Generic Policies and Procedures

The generic policies and procedures can not be taken from one agency and applied to another one. Each agency is unique. These generic policies and procedures are to help OCSA members identify/use minimum policies and procedures that should be in place. The expectation is that each agency will develop its own policies and procedures based on its specific circumstances and obtain legal advice on the content where necessary.

Page Numbering

For the purposes of this document, page numbering has been inserted. However, policies and procedures manuals usually only have numbering for the policies in order to allow for insertion of additional policies and procedures.

Generic Volunteer Management Policies and Procedures

| | |
|---|-------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Volunteer Programs | Subsection Number: I |
| Policy Title: Designated Manager of Volunteers | Policy Number: VM-I-10 |

Policy Statement:
 The agency must have a qualified person(s) designated to manage volunteer resources.

Purpose: To recognize and use the unique skills needed to manage volunteer resources.

Procedures:

| <i>Responsibility</i> | <i>Action</i> |
|-----------------------|--|
| Executive Director | Hires a qualified ⁵ Manager of Volunteers. Ensures adequate budget to recruit, support, train and recognize the contribution of the volunteers. Has a comprehensive job description for the Manager of Volunteers. ⁶ Ensures that the Board of Directors receives regular reports on the role/impact of volunteers on service delivery. |

Contact Person: (job title)
 Quality Dimension: Safety
 OCSA Standard: 3.4.4 B
 Cross-Manual Reference:
 Monitoring Tool(s):
 Relevant Forms:
 Board Approval Date:
 Review Dates:
 Revised Date:

⁵ See Appendix A for information on qualified person to manage the volunteers.

⁶ See Appendix A for information on job competencies.

Generic Volunteer Management Policies and Procedures

| | |
|---|-------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Volunteer Program | Subsection Number: I |
| Policy Title: Evaluation of Volunteer Programs | Policy Number: VM-I-20 |

Policy Statement: The agency must evaluate programs with a volunteer component on a regular basis. *(Each agency needs to identify the time frame)*

Purpose: To evaluate the impact of the volunteer component in the service and identify the areas needing improvement.

*Responsibility**Action*

Manager of Volunteers

Obtains input from paid staff, volunteers, clients for the evaluation of the program.

Evaluates all components of the volunteer management cycle.

Identifies areas of strength and areas for improvement and develops an improvement plan.

Implements the plan.

Contact Person: (job title)

Quality Dimension: Safety

OCSA Standard: 3.4.3 E

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|-------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Volunteer Program | Subsection Number: I |
| Policy Title: Provision of References for Paid Staff and Volunteers | Policy Number: VM-I-30 |

Policy Statement: References will be provided for paid staff and volunteers at their request after a specific length of service. *(Each agency will need to fill in length of service)*

Purpose: To have a consistent approach for the provision of references.

Responsibility

Action

Executive Director

Obtains written permission from paid staff/volunteer to release the information.

Determines the extent of information to be provided for the reference. *(This should be decided by each agency e.g. restricted to position title and dates of service only or include evaluation of the individual's strengths and areas for improvement.)*

Contact Person: (job title)

Quality Dimension:

OCSA Standard: 3.4.16

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|---|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Code of Conduct | Subsection Number: II |
| Policy Title: Confidentiality of Information | Policy Number: VM-II-10 |

Policy Statement:

All paid staff and volunteers must maintain confidential all information obtained from contact with the agency, paid staff, volunteers and clients.

Purpose: To recognize and protect every person’s right to privacy.

Responsibility

Action

Executive Director/
Designate

Ensures all paid staff and volunteers receive information on the need for confidentiality and understands that compliance is a condition of their continued participation in the agency.

Has all paid staff and volunteers sign a confidentiality agreement.

Receives written consent before releasing identifiable information about a person (client and/or paid staff and volunteers).

Defines who has access to confidential information. (*Each agency should define who has access to client records, paid staff/volunteer files, other agency data.*)

Contact Person: (job title)

Quality Dimension:

OCSA Standard:

Cross-Manual Reference:

Safety, Appropriateness

3.2.2 and 3.4.9 A

Storage and Disposal of Records and Files Policies and Procedures (need to develop)

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Code of Conduct | Subsection: II |
| Policy Title: Conflict of Interest | Policy Number: VM-II-20 |

Policy Statement:

All paid staff and volunteers must act in the best interests of the clients and agency without any intention of obtaining direct or indirect benefit.

Purpose: To prevent actual, potential or perceived conflict of interest.

Definition: Includes actual, potential or perceived benefit for personal, business, commercial, financial, political or religious reasons⁷.

Procedures*Responsibility**Action*

Board of Directors

Declares any conflict of interest (real or potential).

Refrains from voting on any matter which is a possible conflict of interest.

Paid Staff/Volunteers

Refrain from doing anything that could result in a conflict of interest for the agency (e.g. buying and selling).

Identify and report to their manager/supervisor any personal conflict e.g. family member's needs.

Inform their manager/supervisor of any prior or existing relationship with a client.

Contact Person: (job title)

Quality Dimension:

Appropriateness

OCSA Standard:

3.4.1 C

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

⁷Adapted from Ministry of Health, *Template, Request for Proposal*, July 1997, p.29.

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Code of Conduct | Subsection Number: II |
| Policy Title: Representing the Agency | Policy Number: VM-II-30 |

Policy Statement:

All paid staff and volunteers must act as ambassadors and representatives of the agency in the performance of their duties, in accordance with their written position descriptions and the agency's policies and procedures.

Purpose: To provide a consistent approach with paid staff and volunteers who represent the agency.

*Responsibility**Action*

Executive Director

Designates spokespersons/media contacts for the agency.

Paid Staff/Volunteers

Seek guidance from their manager/supervisor prior to: making any statement; representing the agency at any event or meeting; and/or taking any action which could affect the organization.

Use pre-approved promotional material.

Inform the manager/supervisor of any issues that could affect the image of the agency.

Contact Person: (job title)

Quality Dimension:

Appropriateness, Safety

OCSA Standard:

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Code of Conduct | Subsection Number: II |
| Policy Title: Dress Code and Conduct | Policy Number: VM-II-40 |

Policy Statement:

All paid staff and volunteers must dress and act at all times in the performance of their duties, in a manner that is appropriate:

- to their assigned responsibilities
- to safety considerations
- to weather conditions
- in representing the image of the agency.

Purpose: To project a positive image for the agency and to promote safety.

*Responsibility**Action*

Manager of Volunteers/
Supervisor of Paid Staff

Informs all paid staff and volunteers of the dress code specific for the service. *(Each agency will need to state for each service specific clothes that should or should not be worn if that is a requirement.)*

Contact Person: (job title)

Quality Dimension: Safety

OCSA Standard: 3.4.1 C

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Code of Conduct | Subsection Number: II |
| Policy Title: Acceptance of Gifts | Policy Number: VM-II-50 |

Policy Statement:

All paid staff and volunteers are discouraged from taking gifts from clients (*Each agency should state what monetary value if any is acceptable*⁸). Borrowing from or lending money to clients is prohibited.

Purpose: To prevent financial abuse of clients.

*Responsibility**Action*

Executive Director

Adjusts the policy as appropriate for specific clients (e.g. those who would be offended if a small gift is not accepted).

Takes disciplinary action if money is borrowed from/or loaned to clients. The action is appropriate to the severity of the specific event. (See Discipline Policy VM-III-100)

Ensures clients who want to borrow money are referred to an appropriate professional and/or agency for assessment of their needs.

Manager of Volunteers/
Supervisor of Paid Staff

Ensures orientation session discusses appropriate responses to offers of gifts etc.

Paid Staff/Volunteers

Suggest to clients who wish to express their appreciation with a gift, to consider donating to the agency.

Report to supervisor any gifts accepted.

Contact Person: (job title)

Quality Dimension:

Appropriateness

OCSA Standard:

3.4.1 C; 3.4.9 A; and 3.4.16

Cross-Manual Reference:

Discipline Policy VM-III-100

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

8

See sample from Community Care Victoria County in Appendix B.

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Code of Conduct | Subsection Number: II |
| Policy Title: Alcohol and Drugs | Policy Number: VM-II-60 |

| |
|---|
| <p>Policy Statements:</p> <ol style="list-style-type: none"> 1. The use, purchase or sale of alcohol or illegal drugs is not permitted while on duty or on the agency’s premises. 2. All paid staff and volunteers are prohibited from being under the influence of alcohol and/or drugs which impair performance and judgement while carrying out their duties. |
|---|

Purpose: To ensure safety of clients, paid staff and volunteers and to prevent illegal activity.

Responsibility

Action

Executive Director

Investigates and seeks information.

Ensures disciplinary action is appropriate to the circumstances and severity of the specific event. (See Disciplinary Policy VM-III-100)

Contact Person: (job title)

Quality Dimension:

Safety, Appropriateness

OCSA Standard:

3.4.1 C and 3.4.16

Cross-Manual Reference:

Disciplinary Policy VM-III-100

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Code of Conduct | Subsection Number: II |
| Policy Title: Smoking | Policy Number: VM-II-70 |

Purpose: To prevent adverse health effects for clients, volunteers and paid staff and to follow any anti-smoking laws.

Each agency needs to develop a policy concerning smoking specific to the law in its area and the needs of its clients.⁹ Remember to include an alert about use of oxygen and smoking.

Contact Person: (job title)
 Quality Dimension: Safety, Appropriateness
 OCSA Standard: 3.4.1 C
 Cross-Manual Reference:
 Monitoring Tool(s):
 Relevant Forms:
 Board Approval Date:
 Review Dates:
 Revised Date:

⁹ See draft sample from Community Care Victoria County in Appendix B.

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Code of Conduct | Subsection Number: II |
| Policy Title: Handling of Funds | Policy Number: VM-II-80 |

Policy Statement: Paid staff and volunteers do not handle the client’s or agency’s money without the agency’s directions.

Purpose: To prevent misappropriation of the client’s and agency’s funds.

Responsibility

Action

Executive Director

Determines specific times that paid staff and volunteers can handle money and the maximum amount of money they can handle. *(This will need to be specific for each agency and each service, for example, shopping for client, payment for Meals on Wheels.)*

Contact Person: (job title)

Quality Dimension:

Appropriateness

OCSA Standard:

3.4.1 C

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Code of Conduct | Subsection Number: II |
| Policy Title: Multicultural/Anti-racism | Policy Number: VM-II-90 |

Policy Statement: The agency must demonstrate commitment to racial equality and elimination of racism. The agency will strive to have paid staff and volunteers be reflective of the community and will be sensitive to the needs of cultural and racial groups.¹⁰

Purpose: To ensure racial equality and the elimination of racism.

*Responsibility**Action*

Executive Director

Ensures that communications present a positive and balanced portrayal of racial and cultural minorities.

Provides guidelines for recruiting, interviewing and hiring paid staff and volunteers.

Ensures that staff and volunteers are trained in cultural sensitivity.

Ensures that services are sensitive to the needs of cultural groups, seek to eliminate barriers to full participation and promote positive race relations.

In conjunction with the Board, develops a disciplinary response to any racist incidents or behaviour. *(Each agency should state what it is for its agency e.g. verbal reprimand, cultural sensitivity training etc.)*

Contact Person: (job title)

Quality Dimension:

Client Perspective

OCSA Standard:

3.4.1 C

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

¹⁰

Policies and procedures adapted from work of Volunteer Centre of Metro Toronto and United Way of Greater Toronto listed in Linda Graff. *By Definition: Policies for Volunteer Programs*. Etobicoke: Volunteer Ontario, 1993, p.29.

Generic Volunteer Management Policies and Procedures

| | |
|--|---------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Code of Conduct | Subsection Number: II |
| Policy Title: Harassment | Policy Number: VM-II-100 |

Policy Statement: The agency will not tolerate harassment or discrimination of any form. All paid staff and volunteers have the responsibility to respect the dignity and rights of co-workers, clients and the public.¹¹

Purpose: To ensure the rights of all paid staff and volunteers to work in an environment free of discrimination and harassment and to ensure clients are free of discrimination and harassment by paid staff and volunteers.

Definition: Harassment may be personal, sexual, racial or ethnic.

*Responsibility**Action*

Board of Directors and
Executive Director

Develop a clear statement as to what behaviour might constitute harassment. (*Each agency must develop this e.g. inappropriate jokes and comments, put downs etc.*)

Ensure agency's harassment policy meets any legislative requirements (e.g. Human Rights Code).

Ensure everyone in the agency receives orientation and ongoing education/training on harassment including:

- what constitutes harassment
- recognition
- prevention
- process for reporting
- handling of complaints
- responsibilities concerning them
- his/her personal rights.

Ensure training attendance and content is documented. (*Each agency must determine if it obtains signatures from individuals that have read any printed material.*)

Contact the agency's lawyer as appropriate when informed of an incident of harassment.

¹¹

Adapted from the policy and procedures of SPRINT.

Generic Volunteer Management Policies and Procedures

Policy VM-II-100

Page 2 of 4

*Responsibility**Action*Board of Directors and
Executive Director

Promote a harassment free environment by encouraging paid staff and volunteers to identify actions or behaviours that they find offensive or unwelcome.

Ensure a process is in place for investigation and follow-up regardless of whom complaint is against.

Ensure clients are made aware of the agency's policy.

Manager of Volunteers/
Supervisor of Paid Staff

Begins factual investigation of alleged harassment immediately.

Immediately removes the accused or the accuser from the current situation.¹²

Gathers written statements from all involved.

Ensures appropriate support to individuals involved in the harassment complaint (i.e. paid staff, volunteer, client, caregiver) including documentation, information concerning legal rights, and the Ontario Human Rights Commission.

Informs paid staff, volunteers and clients of steps to take if harassment has occurred. These steps include:

- do not respond to verbal harassment in kind. Inform the person that you consider such remarks to be harassment and that it will be reported. If others are present, obtain statements as witnesses to harassment.
- where appropriate, leave the area as soon as possible and report the incident to your identified manager/supervisor.
- in case of physical harassment, call for help and leave the area immediately. Report the incident immediately and get what ever assistance is required (e.g. medical attention, police involvement, counselling).
- report the incident in writing.

¹² Follows process in Union contract re: suspension.

Generic Volunteer Management Policies and Procedures

Policy VM-II-100

Page 3 of 4

| <i>Responsibility</i> | <i>Action</i> |
|--|--|
| <p>Manager of Volunteers/ Supervisor of Paid Staff</p> | <p>Ensures both complainant and the alleged offender are interviewed (a support person being present is optional.)¹³</p> <p>If a complaint can not be resolved, conducts an investigation which includes the interviewing of any witnesses.</p> <p>Ensures if a resolution cannot be reached or if the action taken is unsatisfactory, the affected employee can choose to file a written appeal to the Executive Director or, if circumstances make it necessary, the Chair of the Board of Directors. <i>(Each agency will need to state the number of working days by which the appeal needs to be received.)</i></p> <p>Ensures that any consequences for harassment or discrimination are fair and meaningful to all involved e.g. immediate disciplinary action which may be up to and including dismissal for paid staff and volunteers.¹⁴</p> <p>Ensures that the reporting and discussions concerning any harassment are confidential.</p> <p>Has process that all complaints of harassment are reported to him/her.</p> <p>Ensures if harassment cannot be proven and there is some doubt, that the paid staff/volunteer/client is monitored.</p> <p>Documents the investigation and results for any paid staff/volunteer/client who is disciplined in his/her file. <i>(Each agency needs to determine where documentation is kept.)</i></p> <p>Provides relevant information to police as deemed appropriate by the agency's lawyer.</p> |
| <p>Paid Staff/Volunteer</p> | <p>Report immediately to his/her manager/supervisor any knowledge of harassment (i.e. complaint, allegation or witness of harassment or recipient of harassment).</p> |

¹³ If Union situation, include a Union representative if desired.

¹⁴ If Union situation, follows discipline procedures as per collective agreement.

Generic Volunteer Management Policies and Procedures

Contact Person: (job title)

Quality Dimension:

OCSA Standard:

Cross-Manual Reference:

Safety

3.4.1 C, 3.3.4

Recruitment VM-III-10, Screening VM-III-20 in OCSA's Generic Volunteer Management Policies and Procedures and Withdrawal of Service RM-90 in OCSA's Generic Risk Management Policies and Procedures.

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|---------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Recruitment | Policy Number: VM-III-10 |

Policy Statement: Recruitment is targeted to the audiences most likely to have the skills and interests to match the available positions.

Purpose: To recruit people with the best match for specific positions.

*Responsibility**Action*

Manager of Volunteers

Develops an overall recruitment strategy which is updated annually. Ongoing recruitment:

- reflects the goals of client-focused, community driven and quality based service delivery.
- uses a variety of creative recruiting methods which recognize and respond to the changing social and economic trends which impact on the types of persons volunteering and their reasons for volunteering.

Determines the volunteer requirements of the agency with client, volunteer and paid staff input.

Develops position descriptions prior to recruitment (including responsibilities; qualifications if applicable; hours required; screening requirements based on risk audit of the position; orientation, limitations of the position, training and supervision required).

Ensures all recruitment strategies define the expectations of the positions and screening requirements.

Encourages paid staff and volunteers to assist in recruitment through public relation opportunities such as community meetings, displays, word of mouth.

Appendix A. Qualified Manager of Volunteers

Qualified Manager of Volunteers

Note: The following information is adapted from OCSA's final draft standards document, 1998.

Manager of Volunteers

The following points are used to illustrate a "Qualified Manager of Volunteers":

1. There is a Manager of Volunteers who is accountable to the governing body and the funders.
2. The Manager of Volunteers' functions may be carried out by more than one individual depending upon the size of the service and its financial resources.
3. The Manager of Volunteers is qualified by education and/or experience to meet the responsibilities of the position which **may** include but are not limited to:
 - developing administrative policies and procedures
 - developing and implementing continuous quality improvement
 - ensuring the program's compliance with funding requirements
 - implementing the policies of the Long Term Care Act and the governing body
 - recruiting, hiring, orienting, educating/training, supervising and evaluating staff, volunteers and students
 - providing opportunities for staff development
 - planning, coordinating, scheduling and supervising all programming activities (e.g. for Adult Day Service and Congregate Dining)
 - establishing, maintaining and monitoring a system to facilitate scheduling and for the collection of statistical data about the service and clients
 - ensuring the development and ongoing review and monitoring of each client's individual service plan
 - ensuring the efficient delivery of meal services (e.g. Meals and Adult Day Service)
 - ensuring policies of the service are followed
 - being aware of and sensitive to changing community needs and developments
 - promoting the service within the long-term care service continuum
 - ensuring an effective relationship between the service and Community Care Access Centre Case Managers and the community planning bodies.

It is suggested that the qualified manager of volunteers also has the following:

1. Experience managing volunteers.
2. Experience working with the client group (frail elderly, disabled, persons who are cognitively impaired).
3. Knowledge of local community.
4. Valid driver's license and a safe and reliable vehicle is an asset.
5. Strong organizational and interpersonal skills.
6. Strong communication skills.

Qualified Manager of Volunteer Resources

The Ontario Association for Volunteer Administration (OAVA) lists the following as entry level competencies for the management of volunteer resources, the ability to:

1. Plan Programs
2. Develop and Maintain Systems for the management of volunteer resources
3. Market Volunteer Resources
4. Staff Volunteer Services
5. Train Volunteers and Staff
6. Supervise Volunteers and Staff
7. Motivate/Recognize Volunteers, Staff and Community
8. Interact with Other Internal Staff
9. Administer Programs and Systems
10. Manage Finances
11. Conduct Public Relations
12. Interface with Community
13. Pursue Professional Development

Further information is provided in OAVA's *Standards of Practice: Entry Level Competencies for the Management of Volunteer Resources*, 1995 for each of the above competencies.

It is suggested that the preferred candidate possess:

- Community College or University certificate in Volunteer Management and/or
- Certification (e.g. Ontario Association for Volunteer Administration (OAVA), Ontario Association of Directors of Health Care Volunteer Services (ODVH)²⁵, Canadian Association for Volunteer Resources (CAVR), Association for Volunteer Administration (AVA).

**Appendix B. Sample of Community Care Victoria County's
Policies and Procedures**

Generic Volunteer Management Policies and Procedures

Contact Person: (job title)

Quality Dimension:

Safety

OCSA Standard:

3.4.7

Cross-Manual Reference:

Representing the Agency VM-II-30

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|---------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Screening | Policy Number: VM-III-20 |

Policy Statement:

All paid staff and volunteers will be subject to a screening process based on the risk inherent in the position. The screening process will begin with the prospective person's application for a position and will continue throughout the person's tenure.¹⁵

Purpose: To enhance the success and safety of services to the community, agency and individuals.

*Responsibility**Action*

Executive Director

Actively supports screening as an on-going process and the underlying principle of protecting the safety and security of clients, paid staff, volunteers and the community served.¹⁶

Manager of Volunteers/
Supervisor of Paid Staff

Ensures that complete descriptions of all positions are available to prospective volunteers and paid staff.

Ensures a risk audit is conducted on each position by qualified individuals which will include the following four elements:

- vulnerability of the client
- nature of the role and activity
- setting
- degree of supervision.

Ensures a risk audit is conducted on each position annually or when there is a change to a component of the position.

Determines and undertakes the relevant screening steps which will apply to each position based on the risk audit and communicates the information to prospective volunteers and paid staff.

Ensures that decisions made in the screening process are based on the position, and not the individual, and are consistent with agency policy and procedures and with Human Rights Legislation.

¹⁵ Policies and procedures based on information from Street, L. *Screening Handbook*. Ottawa: Canadian Association of Volunteer Bureaux and Centres, 1996.

¹⁶ Note: Police records checks are only one of the tools to be used. Police records checks by themselves are not sufficient.

Generic Volunteer Management Policies and Procedures

Responsibility

Action

Manager of Volunteers/
Supervisor of Paid Staff

Documents steps taken in the screening process and maintains all information obtained in a confidential and secure manner.

Ensures that no individual starts in his/her position until the appropriate steps in initial screening have been completed. This is dependent upon the level of risk inherent in the position.

Contact Person: (job title)

Quality Dimension:

Safety, Appropriateness

OCSA Standard:

3.4.8

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|---------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Exclusion of Applicants | Policy Number: VM-III-30 |

Policy Statement:

The agency will not discriminate against any applicant unless there is a bona fide reason related to the specific position.¹⁷

Purpose: To abide by the Human Rights legislation and to prevent discrimination against potential paid staff and volunteers.

Responsibility

Manager of Volunteers/
Supervisor of Paid Staff

Action

May reject an applicant as a result of information gained through any of the steps in the screening process (including police records checks).

Discusses with the Executive Director any individual cases which require clarification or for which there is a concern.

Ensures each individual where appropriate has the opportunity to appeal the decision in writing to the Board of Directors.

Documents steps taken.

Contact Person: (job title)

Quality Dimension:

Safety

OCSA Standard:

3.4.8

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

¹⁷

Information in the policy and procedures is quoted from and/or based on information from Volunteer Ontario. *Screening Volunteers and Employees Providing Direct Service to Vulnerable Individuals Through Police Records Checks*. Toronto: Volunteer Ontario, 1995 and Street, L. *The Screening Handbook*. Ottawa: Canadian Association of Volunteer Bureaux and Centres, March 1996.

Generic Volunteer Management Policies and Procedures

| | |
|--|---------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Probation | Policy Number: VM-III-40 |

Policy Statement:
 The agency must have a probation period for paid staff and volunteers.

Purpose: To evaluate whether the person has the personal and job related skills and commitment required for the position.

Responsibility

Action

Manager of Volunteers/
 Supervisor of Paid Staff

Determines probation period required for each position. (*Agency will need to state this for each position.*)

Ensures all paid staff and volunteers receive appropriate orientation and training required for their position.

Deals immediately with any performance issues and discusses with the individuals suggestions for improvement.

Encourages each paid staff and volunteer to discuss any issues which affect his/her performance.

Completes performance evaluations at designated time periods.

Discusses performance evaluation with the individuals.

Documents in the paid staff/volunteer’s file the results of the probation period.

Contact Person: (job title)

Quality Dimension:

Safety, Appropriateness

OCSA Standard:

3.4.8 B; 3.4.9; 3.4.10; and 3.4.11

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|---|---------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Orientation and Ongoing Education/Training | Policy Number: VM-III-50 |

Policy Statement:
 All paid staff and volunteers must have orientation and ongoing education/training to the agency and their position.

Purpose: To ensure that paid staff and volunteers have the required knowledge, skills and commitment to carry out the requirements of their position in a safe and effective way.

Responsibility

Action

Manager of Volunteers/
 Supervisor of Paid Staff

Ensures all paid staff and volunteers receive orientation and any required education/training prior to starting their position and during their tenure.

Has each paid staff/volunteer sign a form stating:

- education/training he/she received
- his/her understanding of the expectations for the position
- his/her commitment to apply the education/training to his/her duties.

(Each agency needs to decide if it want this procedure.)

Includes in the orientation for every position:

- mission, vision, values of the agency
- history of the organization
- organizational structure
- reporting relationships
- supervision requirements
- policies and procedures.

Develops educational/training plan to maximize professional development of paid staff and volunteers.

Generic Volunteer Management Policies and Procedures

Policy VM-III-50

Page 2 of 2

*Responsibility**Action*

Manager of Volunteers/
Supervisor of Paid Staff

Includes ongoing education/training specific for each position:

- description of specific tasks to be completed
- identifying, assessing and dealing with risk specific to the position
- what volunteer/paid staff may and may not do
- additional information as required.

Includes a variety of training methods e.g. videos, lectures, role playing, reading materials, buddy system.

Obtains education/ training suggestions from paid staff and volunteers.

Advocates for adequate resources for individuals to attend workshops and conferences.

Authorizes funding requests for appropriate outside training sessions.

Documents in each paid staff/volunteer's file the orientation and training completed.

Evaluates the effectiveness of the orientation and training sessions to identify areas of strengths and improvement.

Paid Staff/Volunteers

Submit requests and funding required to attend outside training sessions to their manager/supervisor.

Contact Person: (job title)

Quality Dimension:

Safety, Appropriateness

OCSA Standard:

3.4.9 and 3.4.10

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|---------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Support, Supervision and Performance Review | Policy Number: VM-III-60 |

Policy Statement: All paid staff and volunteers must receive ongoing supervision and performance review based upon the level of risk of the position and the specific needs of the individual.

Purpose: To monitor the safety and quality of the service provided and to provide feedback for continuous improvement.

*Responsibility**Action*

Executive Director

Assigns a person who provides support and supervision to each paid staff and volunteer and specifies this on the position description.

Provides leadership training and development opportunities to the manager/supervisors.

Manager of Volunteers/
Supervisor of Paid Staff

Offers support, encouragement, direction and consultation to paid staff/volunteers on a regular basis.

Documents accomplishments, accolades, complaints and incidents in paid staff/volunteers' files.

Provides constructive feedback to paid staff/volunteers on a regular basis.

Identifies and recommends appropriate educational opportunities.

Provides ongoing supervision/monitoring through a variety of means (e.g. team meetings, scheduled one-on-one meetings, talking to clients, reviewing client charts, etc.)

Specific for Paid Staff

Supervisor of Paid Staff

Develops and maintains a log of performance reviews to include name, job/position, service, due date of review.

Generic Volunteer Management Policies and Procedures*Responsibility**Action*

Supervisor of Paid Staff

Schedules a performance review at the end of the probationary period and then annually unless the position or individual's performance indicates the need for more frequent reviews.

Facilitates open discussion with paid staff regarding his/her performance, attainment and projection of goals and professional development opportunities.

Documents the performance review and ensures both the supervisor and paid staff review and sign it.

Retains the results of the performance review in each paid staff's file.

Contact Person: (job title)

Quality Dimension:

Safety, Appropriateness

OCSA Standard:

3.4.11

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|---------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Recognition of Volunteers | Policy Number: VM-III-70 |

Policy Statement: The agency recognizes volunteers in ways that are “appropriate and meaningful”.¹⁸

Purpose: To promote volunteer appreciation and to recognize importance of volunteers to the agency.

*Responsibility**Action*

Manager of Volunteers

Plans and conducts ongoing recognition activities such as:

- annual breakfast/lunch events
- regular updates and recognition in newsletters
- certificates, plaques
- daily recognition e.g. snacks, transportation expenses, birthday cards and verbal thank you/feedback
- training and supervision.

Executive Director,
Manager of Volunteers
and Other Staff

Are available to volunteers and interact with them in an informal manner and during formal recognition events.

Periodically share updates on new agency developments, future plans etc.

Board of Directors

Attends volunteer recognition events to receive appreciation and to acknowledge other volunteers.

Contact Person: (job title)

Quality Dimension:

OCSA Standard: 3.4.12 and 3.4.13

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

¹⁸

Adapted from Linda Graff. *By Definition: Policies for Volunteer Programs*. Etobicoke: Volunteer Ontario, 1993, p.52.

Generic Volunteer Management Policies and Procedures

| | |
|--|---------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Retention of Volunteers | Policy Number: VM-III-80 |

Policy Statement: The agency strives to retain volunteers for the maximum time feasible.

Purpose: To promote continuity of service and working relationships with people they are familiar and to decrease human and financial resources related to recruiting and training new volunteers.

Responsibility

Action

Manager of Volunteers/
Supervisor of Paid Staff

- Promotes the satisfaction of volunteers by:
- valuing the volunteers unique role in the agency
 - keeping volunteers interested and challenged in their work
 - being creative in making maximum use of each volunteer’s availability. e.g. short assignments, flexible hours, team volunteering, leave of absence
 - recognizing volunteers’ accomplishments
 - responding to volunteer needs e.g. burnout, time off
 - promoting effective communication strategies
 - ensuring volunteer participation/representation in the development, implementation and evaluation of all services provided by the agency.

Obtains regular feedback from volunteers as to their satisfaction with their positions e.g. focus group meetings, questionnaires, one-on-one discussions.

Conducts exit interviews with volunteers to obtain suggestions for improving the retention of volunteers.

Contact Person: (job title)

Quality Dimension:

Continuity

OCSA Standard:

3.4.14

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|---------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Resignation | Policy Number: VM-III-90 |

Policy Statement: All volunteers are expected to inform the agency when they can no longer volunteer.

Purpose: To promote continuity of service.

*Responsibility**Action*

Manager of Volunteers

Informs volunteers of the requirement.

Ensures an exit interview is conducted.

Documents exit reasons.

Provides letter of thanks.

Follows up with any issues/concerns identified within the agency as a result of the exit interviews.

Contact Person: (job title)

Quality Dimension:

Continuity

OCSA Standard:

3.4.17

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|----------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Discipline/Dismissal | Policy Number: VM-III-100 |

Policy Statement: All paid staff and volunteers are expected to perform their duties as outlined in their position description and the agency’s policies and procedures in a safe and effective manner. Failure to do so may result in dismissal.¹⁹

Purpose: To protect clients, paid staff, volunteers and the agency and to provide an effective service.

Responsibility

Action

Executive Director

Ensures each paid staff and volunteer receives:

- screening appropriate for his/her position
- position descriptions
- orientation and ongoing training on the policies and procedures of the agency and requirements of his/her position
- orientation on the agency’s discipline/dismissal procedures, including:
 - counselling
 - verbal warnings
 - written warnings
 - reassignment
 - suspension
 - dismissal (see definitions below)
- probation period with appropriate feedback
- regular supervision appropriate to his/her position and his/her specific needs.

Ensures relevant dated documentation in the paid staff/volunteers’ files e.g. screening results, orientation and training received, results of probation period, results of supervision, specific problems and action taken.

Has an appeals process in place and available to paid staff and volunteers. (See Appeals Policy VM-III-110)

¹⁹ In unionized setting, please refer to union contract.

Generic Volunteer Management Policies and Procedures

Policy VM-III-100

Page 2 of 3

*Responsibility**Action*

Executive Director

Outlines conditions under which paid staff and/or volunteers would be immediately suspended or dismissed. *(Each agency should state these e.g. charges of fraud, theft, sexual assault, child or elder abuse.)*

Outlines who is responsible for which steps in the discipline/dismissal procedures.

Promotes safety of clients, other paid staff and volunteers and the agency from any possible negative actions from the person dismissed. *Each agency will need to develop its own procedures.*

Examples include:

- *informing all clients that received services from the paid staff/volunteer, other staff and volunteers and other agencies involved that he/she is no longer working with the agency.*
- *obtaining any relevant agency information/equipment e.g. keys, client files.*

Seeks expert advice from human resource specialist and/or lawyer as appropriate.

Ensures any actions for paid staff meet the requirements of the Employment Standards Act.

Reports action to appropriate authorities as necessary.

Manager of Volunteers/
Supervisor of Paid Staff

Documents the reasons for the dismissal in the volunteer's/paid staff's file.

An example²⁰ of different stages to the disciplinary process include:

Counselling: When a concern first arises, the paid staff/volunteer and manager/supervisor will meet to discuss the concern. The concern will be put in terms of actual behaviour which is deficient. This provides an opportunity to discuss solutions in a supportive, non threatening manner.

Verbal Warning: Should the behaviour or concern not be rectified through counselling, the manager/supervisor will advise the paid staff/volunteer of the concern and expected behaviour. This discussion will be documented and placed in the personnel file.

Policy VM-III-100

Page 3 of 3

²⁰

Used by Halton Helping Hands (original source unknown).

Generic Volunteer Management Policies and Procedures

Written Warning: If the behaviour persists, the paid staff/volunteer will meet again to review the inappropriate behaviour and determine a method to change the behaviour. The consequence of not changing will be discussed. This conversation will be documented in a letter signed by both parties and placed in the person's file.

Disciplinary Suspension: The paid staff/volunteer will be advised by letter that he/she will be placed on temporary suspension from regular duties for a specified period of time to reinforce the serious nature of failure to comply with the required actions.

Termination/Dismissal: If there are no other alternative solutions and the behaviour has not been corrected, the paid staff/volunteer's employment/placement will be terminated.

Contact Person: (job title)
Quality Dimension: Safety
OCSA Standard: 3.4.16
Cross-Manual Reference: Appeals Policy VM-III-110
Monitoring Tool(s):
Relevant Forms:
Board Approval Date:
Review Dates:
Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|----------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Management Cycle | Subsection Number: III |
| Policy Title: Appeal Process | Policy Number: VM-III-110 |

Policy Statement: Every individual (client, paid staff, volunteer) must have access to an appeal process.²¹

Purpose: To provide an opportunity for review and resolution of client/paid staff/volunteer complaints.

Responsibility

Action

Executive
Director/Board of
Directors

Designates a person/committee to deal with specific appeals, for example:

- person not eligible to receive a service (unless the eligibility is determined by the Community Care Access Centre)
- termination of a service
- person being fired
- potential volunteer being rejected.

Designates time frame to initiate the appeals process. *(Each agency should state what it is for its organization.)*

Handles complaints by clients regarding community support services in accordance with government and Community Care Access Centre regulations.

Encourages all reasonable attempts to reach a mutually agreed upon resolution. *(Each agency will need to develop its own process.)* An example of steps which may be included:

1. Meeting of manager/supervisor with the complainant(s)
 - informs complainant of steps available in the appeals process
 - attempts to develop an agreeable solution *(within time frame established by the specific agency)*
 - documents the process

²¹ Based on the policy and procedures developed by Durham Region Community Care.

Generic Volunteer Management Policies and Procedures

Responsibility

Action

Executive
Director/Board of
Directors

If resolution is not reached:

2. Conference with complainant, manager/supervisor and any other key persons involved:

- attempts to develop an agreeable solution (*within time frame established by the specific agency*)
- documents the process and forwards documentation to complainant and Executive Director.

If resolution is not reached, the process moves on to the following steps with documentation and time frames set for each step:

3. Meeting of Executive Director with complainant
4. Meeting with internal agency review committee
5. Meeting with External Appeals Board (for clients). *See details stated in the Long Term Care Act.*

Contact Person: (job title)

Quality Dimension:

Client Perspective

OCSA Standard:

3.4.16 C

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection Heading: Other Agency Specific | Subsection Number: IV |
| Policy Title: Fraud and Theft | Policy Number: VM-IV-10 |

Policy Statement:

All paid staff and volunteers must report any cases of suspected/actual fraud or theft to their manager/supervisor.

Purpose: To respond to suspected/actual fraud²² in a consistent and professional manner.

Responsibility

Action

Manager of Volunteers/
Supervisor of Paid Staff

Speaks with all parties involved (paid staff/volunteer and client) to:

- clarify/verify information
- obtain a signed statement of the paid staff/volunteer’s statement of events.

Informs the Executive Director.

Executive Director

If fraud or theft appears to have been committed or planned:

- discusses with the agency’s lawyer the type and extent of information that can be released to the police
- notifies the police
- may suspend, with or without pay, the paid staff/volunteer under investigation
- notifies the agency’s insurer and lawyer.

Dismisses from the agency any paid staff/volunteer who is found guilty in a court of law.

Contact Person: (job title)

Quality Dimension:

Safety

OCSA Standard:

3.4.1C

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

²²

Definitions for fraud and theft can be found in Section 322 and 380 in the Criminal Code of Canada or in the Dictionary of Canadian Law (authors Dukelow, D. and Nuse, B.)

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Other Agency Specific | Subsection Number: IV |
| Policy Title: Vacation/Leave of Absence | Policy Number: VM-IV-20 |

Policy Statement: All volunteers are expected to give notice of their planned absences. At least two weeks notice is required. *(Each agency lists the specific number of weeks.)*

Purpose: To ensure smooth day to day operations of the agency.

*Responsibility**Action*

Manager of Volunteers

Attempts to fill the vacant volunteer position.

Notifies managers of services of any gaps or possible service disruptions.

Contact Person: (job title)

Quality Dimension:

Continuity

OCSA Standard:

Cross-Manual Reference:

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Other Agency Specific | Section Number: IV |
| Policy Title: Reimbursement | Policy Number: VM-IV-30 |

Policy Statement:

All paid staff and volunteers are eligible for reimbursement of allowable expenses incurred while fulfilling assigned duties.²³

Purpose: To ensure paid staff and volunteers are reimbursed for allowable expenses.

Responsibility

Action

Manager of Volunteers/
Supervisor of Paid Staff

Establishes and describes process to receive reimbursement.
Each agency should state the process e.g. paid staff and volunteers seek out and complete expense reimbursement form and return to Manager of Volunteers/Supervisor of Paid Staff.

Informs paid staff and volunteers which items are reimbursable.
Each agency should state what is reimbursable for its specific agency e.g.

- *mileage at the rate of \$.xx per km. Or the cost of public transportation to/from/during an assignment*
- *parking expenses*
- *meals (include length of time with the agency before provided)*
- *training expenses/workshop fees.*

And in what time frame e.g. at month end.

An agency may want to include: reimbursement of the cost of obtaining a police records check after 3 month probationary period.

Contact Person: (job title)
Quality Dimension:
OCSA Standard: 3.4.1 C and 3.5.1 I
Cross-Manual Reference:
Monitoring Tool(s):
Relevant Forms:
Board Approval Date:
Review Dates:
Revised Date:

²³ Adapted from Linda Graff. *By Definition: Policies for Volunteer Programs*. Etobicoke: Volunteer Ontario, 1993, p.53.

Generic Volunteer Management Policies and Procedures

| | |
|--|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Other Agency Specific | Subsection Number: IV |
| Policy Title: Insurance for Driving | Policy Number: VM-IV-40 |

Policy Statement: Paid staff and volunteers who use their cars as part of their positions must notify their insurance agents, arrange for insurance coverage (*at the current recognized minimum amount*) and must check with their insurance agents that the insurance coverage is appropriate for the situation.

Purpose: To provide appropriate insurance coverage for the paid staff and volunteers using their cars in the delivery of services and to protect the agency, clients, paid staff and volunteers.

*Responsibility**Action*

Manager of Volunteers/
Supervisor of Paid Staff

Ensures that each paid staff and volunteer has completed and signed the "Confirmation of Insurance" form prior to the individual starting his/her position and on an annual basis. The form is placed in the individual's file.

Contact Person: (job title)

Quality Dimension:

Safety

OCSA Standard:

2.3.2 B

Cross-Manual Reference:

Agency Insurance Coverage RM-70 in OCSA's Generic Risk Management Policies and Procedures

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

Generic Volunteer Management Policies and Procedures

| | |
|---|--------------------------------|
| Section Heading: Volunteer Management | Section Number: VM |
| Subsection: Other Agency Specific | Subsection Number: IV |
| Policy Title: Mandatory Volunteers/Special Case Volunteers | Policy Number: VM-IV-50 |

Policy Statement: The agency may accept individuals participating in government sponsored employment programs, Community Service Orders, or student/co-op placements. Specific guidelines and agreements with each organization/program/school must be established to clarify issues and responsibilities.²⁴

Purpose: To make effective use of volunteers and to prevent inappropriate placements.

*Responsibility**Action*

Executive Director

Designates an agency member to be the contact person with the participating organization/program/school.

Directs the organization/program/school to provide a contact person.

Develops a contract/guidelines with the participating organization/program/school to outline roles, responsibilities, restrictions, time commitment, and insurance/liability issues.

Designates an agency member to supervise the volunteer.

Follows interviewing and screening procedures with each applicant as outlined in Screening Policy

Prepares reports and provides follow-up as necessary.

Evaluates the program's effectiveness.

²⁴Adapted from work of Steve McCurley listed in Linda Graff. *By Definition: Policies for Volunteer Programs*. Etobicoke: Volunteer Ontario, 1993, p.25.

Generic Volunteer Management Policies and Procedures

Specific for Community Service Orders

Policy Statement: The agency will not accept individuals under the Community Service Order Program if they have been charged with a violent or sex-related offense. For all other offenses, the agency will accept or preclude individuals based on the position description and the nature and severity of the offense and in keeping with the Human Rights Code.

Purpose: To protect the safety of the clients, paid staff, volunteers and the agency.

Responsibility

Action

Executive Director

Same procedures as above and
Reviews and approves each applicant on an individual basis.

Contact Person: (job title)

Quality Dimension:

Safety

OCSA Standard

3.4.1 C

Cross-Manual Reference:

Screening Policy VM-III-20

Monitoring Tool(s):

Relevant Forms:

Board Approval Date:

Review Dates:

Revised Date:

File name: