

<p>Title: Volunteer Engagement Policy (Non-Board Volunteers)</p>	<p>Effective Date: Last Reviewed & Approved: Scheduled Review Date: Supersedes: Approved by:</p>	<p>December 12th, 2018 December 12th, 2018 December 2021 All Previous Volunteer Engagement Policies Executive Committee</p>
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Mission Statement: To partner with the community to support our Hospital in the delivery of an excellent patient care experience

Vision Statement: To inspire a lifetime of philanthropic support for our Hospital

Values: Integrity, Leadership, Community, Results

POLICY STATEMENT

1. Introduction

The St. Thomas Elgin General Hospital Foundation (the “Foundation”) recognizes that volunteers play an important role in furthering its Mission, enhancing fundraising activities and enriching its programs, and increasing communications and positive relationships in the community.

The Volunteer Engagement Policy consists of several policies that reflect the most recent and applicable municipal, provincial, and federal legislation.

2. Definitions

Accessible: Spaces, communication, and information that can be accessed by anyone regardless of ability. Examples include accessible washrooms which remove barriers for physical disabilities or exclude any gender identities, or an accessible website with screen reading technology and adaptable font size.

Accommodation: The action that can be taken, when possible, to meet the ability needs of someone with special needs.

Associate: A Foundation employee, director, donor, job candidate, volunteer or prospective volunteer.

Card: A hand-written card by staff that specifically thanks volunteers for their work.

Confidential: Intended to be kept secret or kept in confidence to a specific individual.

Conflict of Interest: A situation where an individual has a direct or indirect competing interest with Foundation activities. This competing interest may result in the individual being in a position to benefit from the situation. A conflict of interest also includes conduct which is not in keeping with the Mission, Vision and Values of the Foundation.

Disability: Mental, physical, learning disabilities, chronic illness, mental illness and anything that would be prescribed as a disability from an insurer.

Discrimination: Any form of intentional or unintentional unequal treatment based on a protected ground that results in disadvantage, whether imposing extra burdens or denying benefits. Discrimination needs only to be one factor among many factors in a decision or action for a finding of discrimination to be made.

Due Diligence: Using common sense and appropriate reasoning to determine whether and how information is used and decisions are made.

Evaluation: An assessment of volunteer performance, how effectively the volunteer is meeting role expectations, and if the volunteer role remains a good fit.

Exit Interview: A survey or conversation regarding factors related to a volunteer's exit and/or additional information that the Foundation can use to improve the volunteer program.

Feedback: A volunteer's and/or staff member's thoughts on the role, the program, the organization or any combination thereof.

Harassment: A course of comments or actions that are known, or ought reasonably to be known, to be unwelcome. It can involve words or actions that are known or should be known to be offensive, embarrassing, humiliating, demeaning or unwelcome.

Human Rights Legislation: The Ontario Human Rights Code which protects Ontarians from discrimination in all its forms.

Incident: A circumstance serious enough to require immediate attention to a volunteer or staff? Incidents can occur because of a volunteer's actions, or instead in the presence of a volunteer. This can include breaking boundaries or rules, failing to follow instructions, near-accidents or any occurrence that is problematic.

National Volunteer Week: The week every April set by Volunteer Canada to celebrate volunteers across the country.

Personal Information: Any information relating to someone's person including, but not limited to: name, legal name, birthdate, home address, office address, phone number, e-mail address, emergency contact name and contact, medical records, health conditions, education and work experience.

Provincial and Federal Law: The Freedom of Information and Protection of Privacy Act as administered by the Government of Ontario (where related to government, crown agencies and institutions collecting data) and the Personal Information Protection and Electronic Documents Act as administered by the Federal Government.

Position Description: A written declaration of the volunteer's activities (responsibilities), qualifications (skills, experience needed) and requirements (abilities, time, screening, etc.). This position description can also be used as the position posting.

Recognition: Celebrating and demonstrating gratitude for the time and effort the volunteer gives to the agency.

References: Individuals that may be contacted – with the consent of potential volunteers – to confirm identity, activity and previous engagements by the staff member recruiting volunteers.

Role Creation: The first step in determining the need for a volunteer and should always be considered before writing the position description.

Screening: The entire process of volunteers applying to, interviewing with and being selected by the Foundation. Selection, interviewing, application, reference checking and candidate follow-ups are all included in this process.

Workplace: Any area where tasks are carried out on behalf of an organization. This can be an office, a private residence during times when tasks for an organization are taken on, or a public area during times when staff or volunteers are carrying out activities related to an organization.

3. Accessibility Policy

The purpose of an Accessibility Policy is to ensure that volunteers of any ability are engaged and recruited by the Foundation, and that all volunteers are equipped to work and provide service to Associates and members of the public with disabilities.

Volunteer Responsibilities

It is the responsibility of volunteers to follow the Customer Service Standard requirements and the procedures of this policy in providing service to Associates, members of the public, and the Hospital.

Staff Responsibilities

It is the responsibility of staff who are recruiting, engaging, and working with volunteers to be mindful of accommodations required by applicants who may have disabilities. The screening process must be respectful of volunteers with disabilities.

4. Conflict of Interest Policy

The high level of public support and respect that the Foundation enjoys results not only from the recognition of its Mission, but from the high degree of integrity, objectivity, and professionalism of Foundation volunteers. The purpose of the Conflict of Interest policy is to establish a standard of conduct to ensure that volunteers act in the best interests of the Foundation.

These standards are intended to enhance public confidence in the integrity of the Foundation and its volunteers. The Foundation benefits from the expertise of individuals with a multiplicity of interests; however, those interests must not conflict with the interests of the Foundation nor impair the public support and respect necessary for the operation of the Foundation.

A conflict of interest refers to a situation where a volunteer has a direct or indirect competing interest with Foundation activities. This competing interest may result in the individual being in a position to benefit from the situation.

A conflict may arise where an individual is a party to a contract with the Foundation or has an interest in an enterprise, or is related to a person who is party to such a contract; or where an individual receives payment from the Foundation for services rendered to the Foundation other than reimbursement for reasonable out-of-pocket expenses measured according to the Foundation's policies on expense re-imburement.

A conflict of interest also includes conduct which is not in keeping with the Mission, Vision and Values of the Foundation. Conflicts of interest includes, but is not limited to situations:

- i) Where a volunteer's private affairs or financial interests are in conflict with their work duties, responsibilities and obligations, or result in a public perception that a conflict exists;
- ii) Which could impair the volunteer's ability to act in the public interest;
- iii) Where the actions of a volunteer would compromise or undermine the trust that the public places in the Foundation.

Volunteer Responsibility

Volunteers are responsible for reading and understanding the conflict of interest policy, for asking any questions about the policy they don't understand, and to ensure they document any known or perceived conflicts of interest.

Staff Responsibility

It is the staff's responsibility to ensure that volunteers are aware of expectations regarding the reporting of a conflict of interest.

5. Confidentiality Policy

The Foundation collects personal information from volunteers, staff, donors, vendors and community members for a variety of purposes and will only be collected for each stated purpose. Volunteers may interact with and become aware of personal information of others in relation to their work with the Foundation. This information is to remain confidential and must not be divulged externally unless it is deemed necessary for the volunteer's position. Certain information may need to be shared with staff when appropriate for, and included in, the role description.

Volunteer Responsibilities

It is the responsibility of volunteers to maintain the confidentiality of information seen, observed or worked with, especially that of Foundation donors and prospective donors. Volunteers must be aware of accidental ways in which it is possible to breach confidentiality, such as talking about volunteer work outside of their role.

Staff Responsibilities

It is the responsibility of all Foundation staff to ensure volunteers sign the confidentiality pledge and that these signed pledges be kept on file for seven (7) years from the start of volunteer engagement.

Foundation staff will include which information volunteers are allowed to share with them in the position description for that particular role. All staff contact information is available on the Foundation's website.

6. Dismissal Policy

The purpose of a dismissal policy is to ensure that dismissal of volunteers is fair, equitable and reasonable based on the process outlined in this policy and the expectations, responsibilities and consequences of volunteer actions.

Volunteer Responsibilities

It is the responsibility of volunteers to understand their expectations and be aware of the Dismissal Policy and process and to follow each step accordingly.

Staff Responsibilities

Foundation staff will determine the responsibilities of each volunteer role – along with any associated expectations, boundaries, duties, and rules that are appropriate. Staff will ensure volunteers are aware of their expectations and responsibilities, and all possible consequences for failing to meet these expectations, breaching a boundary, or inappropriate behaviour. When necessary, Foundation staff are responsible for following the procedures of this policy.

7. Feedback and Evaluation Policy

Volunteers associated with the Foundation have the right to receive feedback from staff regarding their performance on a regular basis through a variety of means and at different intervals during their engagements. Volunteers also have the right to provide feedback to staff on their role and work as well as the opportunity for an exit interview when they leave.

Volunteer Responsibilities

It is the responsibility of volunteers to provide immediate feedback when necessary, and/or request a meeting with staff when in need of support or to provide feedback. Volunteers are invited to provide feedback via an exit interview when they leave the organization.

Staff Responsibilities

It is the responsibility of staff to provide an informal feedback meeting to volunteers after one (1) month and to determine the appropriate length of time by which to assess volunteers through a formal evaluation process (on average, after three (3) months). During this evaluation, volunteers can be given the opportunity to provide feedback on their role and the program. Staff must maintain proper documentation of performance reviews and feedback discussions via formal or informal means, and this documentation should

be placed in the volunteer's personnel file. It is the responsibility of staff to annually review the formal evaluation template to be used with volunteers at the appropriate interval. Staff should also be open to receiving feedback.

8. Privacy and Personal Information Policy

In adherence to the Personal Information Protection and Electronic Documents Act, this policy ensures the privacy and protection of volunteer's personal information.

The Foundation is committed to protecting the privacy of personal information of all stakeholders in the organization including volunteers. This is in accordance with federal and provincial government privacy legislation to ensure the collection, safeguarding and appropriate disclosure of personal information. Pursuant to this policy, all individuals have the right to their own personal information stored and used by the Foundation.

Volunteer Responsibilities

It is the responsibility of volunteers to provide consent for the collection of their personal information.

Staff Responsibilities

The Foundation collects and uses personal information from volunteers to support program delivery and for the following specific reasons:

- i) In the application and recruitment process of volunteers;
- ii) Maintaining contact with volunteers to ensure coverage of shifts and responsibilities and letting volunteers know of opportunities;
- iii) Satisfying statistical reporting requirements (such as locations of volunteers) detached from personal identifiers;
- iv) Accommodating volunteers with disabilities, illnesses and/or injuries;
- v) Supporting ongoing training and development; and,
- vi) Keeping volunteers aware of organization activities and events.

For all of these and any purpose, it is the responsibility of Foundation staff to request consent for a new use of personal information. The organization is expected to only disclose specific information as dictated by funding requirements and where applicable by provincial and federal law. No information will be disclosed without prior consent from volunteers with the exception of information made anonymous. If differing from the "Information Storage" procedure, it is the responsibility of Foundation staff and the Executive Director to determine how long they will retain volunteer information after the volunteer has ceased their engagement with the organization.

9. Resignation Policy

The Foundation asks that volunteers provide staff with a minimum of one (1) week's notice of their resignation. Volunteers are not obligated to provide a reason for resignation.

Volunteer Responsibilities

Volunteers who wish to resign from their position should follow the protocol in place.

Staff Responsibilities

Staff are expected to know and understand this policy, and ensure that a volunteer's resignation is handled appropriately and in consultation with the Executive Director for any additional guidance.

10. Role Creation and Position Description Policy

The Foundation will create volunteer roles following the appropriate procedure and will provide fulfilling opportunities for volunteers to help the Foundation achieve its Mission. Position descriptions will be developed following a standard template that will be reviewed and updated regularly to ensure clarity and consistency.

Volunteer Responsibilities

All volunteers should address the position description as written compared to the reality of their roles during or after their engagement to ensure the accuracy of the role creation process. Volunteers should be asked for thoughts on the role creation process and can contribute ideas for future revisions of the process.

Staff Responsibilities

Any staff member looking to engage volunteers must follow the role creation and position description development process. It is their responsibility to determine the need for the role, perform the risk assessment, and prepare the position description. It is the responsibility of the Executive Director to determine and oversee the steps of role creation and the position description template.

11. Recognition Policy

To celebrate the volunteers who support the Foundation, an annual event will be held, along with cards and, in some cases, a small gift. Recognition will also take place through a variety of means during different parts of the year, including National Volunteer Week.

Staff Responsibilities

It is the responsibility of the Foundation to organize and host an annual volunteer recognition event. It is the expectation that all Foundation staff participate in the annual volunteer recognition event.

12. Screening Policy

The Foundation will screen and select candidates based on requirements determined through an assessment of risks. Interviews and requirement requests will be conducted in a manner that reflects the labour and human rights legislation in Ontario. The screening process will take reasonable precautions – based on risks assessed in each volunteer role – to ensure volunteers selected can meet the requirements of the role in a fair and equitable manner.

Volunteer Responsibilities

Volunteer candidates will complete application forms and demonstrate that they meet application requirements honestly and to the best of their ability. Volunteer candidates will provide references if required for the role and complete any orientation and training necessary to ensure they are prepared for the role.

Staff Responsibilities

Staff will conduct a risk assessment for all volunteer roles to determine the screening requirements. These requirements should be linked directly to the risk (such as vulnerable sector checks for volunteers working with vulnerable clients) and should be focused on the role, not the potential individual filling the role. It is the responsibility of the Executive Director to determine a standardized application form and process that will be updated yearly and followed by all potential volunteers.

It is the responsibility of the staff member recruiting volunteers to develop appropriate interview questions for phone and/or in-person interviews (whichever is necessary). Requesting references and other requirements will be based on the requirements determined by the risk assessment. If references are requested, they must be contacted.

It is the responsibility of any party involved in the screening process (accepting applications, interviewing candidates, following-up on requirements) to make a determination on whether potential volunteers may be unfit based on the specific requirements expected of them.

Failure to follow this policy and the screening procedure prescribed herein will result in inconsistent volunteer recruitment and selection and a dilution of the Foundation's mission in recruiting volunteers. Staff will be reminded of the policy and given additional assistance in volunteer screening if requested to comply with this policy.

Feedback from volunteers will be collected after the beginning of their engagement to assess the effectiveness of the screening process.

13. Review

13.1 The Volunteer Engagement Program Policy will be reviewed every three years.

13.2 In the interim, this Policy may be revised or rescinded if the Board of Directors deems necessary.

13.3 If this Policy is revised or rescinded, all secondary documents will be reviewed as soon as reasonably possible in order to ensure they comply with the revised Policy or, in turn, are rescinded.

14. References

14.1 AccessForward, Training for an Accessible Ontario

14.2 Accessibility: Persons with Disabilities Policy, STEGH

14.3 Canadian Code for Volunteer Involvement

14.4 Donor Bill of Rights

14.5 Imagine Canada. Standards Program for Canada's Charities & Non Profits, 2013.

14.6 Ontario Human Rights Code

14.7 [Personal Information Protection and Electronic Documents Act](#) (PIPEDA)

- 14.8 Personal Health Information Protection Act (PHIPA)
- 14.9 Volunteer Toronto, www.volunteertoronto.ca
- 14.10 Workplace Disrespectful Behaviour, Violence, Harassment, Sexual Harassment and Discrimination Policy

15. Supporting Documents

- 15.1 Interest Survey
- 15.2 Position Description
- 15.3 Agreement Form
- 15.4 Consent for Photographs, Films, Videotapes and Sound Recordings
- 15.5 Letter of Welcome
- 15.6 Volunteer Program Brochure

Volunteer – Interest Survey

PLEASE CHECK ALL THAT APPLY TO YOU:

1. Previous experience and skills:

- | | |
|--|---|
| <input type="checkbox"/> Business Management
<input type="checkbox"/> Communications
<input type="checkbox"/> Education
<input type="checkbox"/> Ethics
<input type="checkbox"/> Finance (Accounting)
<input type="checkbox"/> Fundraising
<input type="checkbox"/> Governance
<input type="checkbox"/> Human Resources Management
<input type="checkbox"/> Information Management | <input type="checkbox"/> Legal
<input type="checkbox"/> Marketing & Public Relations
<input type="checkbox"/> Policy
<input type="checkbox"/> Project Management
<input type="checkbox"/> Public Speaking
<input type="checkbox"/> Risk Management
<input type="checkbox"/> Strategic Planning
<input type="checkbox"/> Volunteer Development/Recruitment
<input type="checkbox"/> Other: _____ |
|--|---|

2. Personal skills/expertise:

- | | |
|--|--|
| <input type="checkbox"/> Community Outreach
<input type="checkbox"/> Event Planning
<input type="checkbox"/> Information Management
<input type="checkbox"/> Leadership Coaching
<input type="checkbox"/> Marketing & Public Relations
<input type="checkbox"/> Photography/Video | <input type="checkbox"/> Program Facilitator
<input type="checkbox"/> Strategic Planning
<input type="checkbox"/> Writing
<input type="checkbox"/> Other: _____ |
|--|--|

3. I wish to become more involved in these areas:

- | | |
|--|---|
| <input type="checkbox"/> Serving on Board or Committee | <input type="checkbox"/> Board of Directors
<input type="checkbox"/> Finance
<input type="checkbox"/> Fundraising (Special Events)
<input type="checkbox"/> Policy & By-Law
<input type="checkbox"/> Other: _____ |
|--|---|

4. I have fundraising/development experience in these areas:

- | | | |
|---|--|---|
| <input type="checkbox"/> Planning & Organization
<input type="checkbox"/> Proposal Writing
<input type="checkbox"/> Campaign Coordination | <input type="checkbox"/> Corporate Giving
<input type="checkbox"/> Telephone Solicitations
<input type="checkbox"/> Direct Solicitations | <input type="checkbox"/> Foundations
<input type="checkbox"/> Other: _____ |
|---|--|---|

5. I would be interested in volunteering for program, activities, meetings and events that meet:

- | | |
|---|--|
| Weeknights M T W T F | <input type="checkbox"/> Monthly |
| Weekdays M T W T F | <input type="checkbox"/> Weekly |
| Weekends: Sat Sun | <input type="checkbox"/> As Needed |
| Other _____ | |
| <input type="checkbox"/> 8 Weeks | <input type="checkbox"/> Up to 6 months |
| <input type="checkbox"/> Up to 3 months | <input type="checkbox"/> Short term projects |

Name: _____

Contact: _____(Day) _____ (Evening) _____ (Email)

Mailing Address: _____

Occupation: _____

Volunteer – Position Description

Position Title and Purpose: _____

Responsibilities: _____

Qualifications: _____

Time Commitment: _____

Location: _____

Screening: _____

Orientation & Training: _____

Dress Code: _____

Benefits: _____

The St. Thomas Elgin General Hospital Foundation reserves the right to conduct background and reference checks on all volunteers.

The St. Thomas Elgin General Hospital Foundation will ensure that, where possible, special needs are accommodated.

Volunteer's Signature: _____ **Date:** _____

_____ (Please Print Name)

Supervisor's Signature: _____

Volunteer Agreement

The St. Thomas Elgin General Hospital Foundation agrees to accept the services of _____

beginning of (date) _____ and we commit to the following:

1. To provide adequate orientation, training and assistance to enable you to meet the responsibilities of your position;
2. To ensure diligent supervisory support and to provide feedback on your performance;
3. To be receptive to any feedback that may help us mutually accomplish our respective tasks more effectively; and,
4. To treat you as an equal partner with staff, jointly responsible for accomplishing the Foundation's mission and goals.

The Foundation collects and uses personal information from volunteers to support program delivery and for the following specific reasons:

- i) In the application and recruitment process of volunteers;
- ii) Maintaining contact with volunteers to ensure coverage of shifts and responsibilities and letting volunteers know of opportunities;
- iii) Satisfying statistical reporting requirements (such as locations of volunteers) detached from personal identifiers;
- iv) Accommodating volunteers with disabilities, illnesses and/or injuries;
- v) Supporting ongoing training and development; and,
- vi) Keeping volunteers aware of organization activities and events.

Volunteer

I, _____, agree to serve as a volunteer and commit to the following:

I have received and read a copy of the Volunteer Engagement Policy.

In my capacity as a volunteer at the Foundation, I may learn personal facts about Associates. I may also become aware of confidential information related to the operation of the organization.

I understand that I must exercise due diligence and caution in any discussion related to the Foundation and its business. I understand that confidential information may be disclosed to me in the course of my duties and will not be divulged unless I believe that it is necessary and would only do so to my immediate supervisor.

I also understand that confidentiality is not limited to my current affiliation with the Foundation and that it continues in perpetuity.

I will:

1. Perform my volunteer duties to the best of my ability;
2. Adhere to the policies and procedures of the Foundation including dealing with code of conduct, conflict of interest, privacy and confidentiality;
3. Meet designated time and duty commitments. In the event I cannot fulfill my duties, I will provide adequate notice so that alternate arrangements can be made for coverage; and,
4. Act at all times as a member of the team responsible for accomplishing the Mission and goals of the Foundation.

By signing this document, I consent to my personal information being collected for the sole purpose as indicated. I acknowledge that my information will be used, safely stored, and protected by the Foundation for the duration that it is needed and/or my engagement as a volunteer.

Agreed by:

Volunteer: _____ Date: _____

Supervisor: _____ Date: _____

Volunteer Program Procedures

Accessibility Policy

Staff who directly supervise volunteers shall:

- i) Be asked to assess and identify the actual abilities needed for a volunteer position when posting opportunities.
- ii) Ensure that volunteering premises are accessible and provide an accessible washroom. This applies to on-site and off-site facilities.
- iii) Ensure that outreach, recruitment, and other initiatives take place in accessible facilities and consider possible accommodation needs to communicate with those attending.
- iv) Check appointment, interview, and registration information for accommodations of volunteers and other Associates ahead of meetings, sessions or other events.
- v) Provide training to volunteers on the Customer Service Standard via the Government of Ontario “AccessForward” free online training module. This training addresses techniques and knowledge required to effectively serve clients with disabilities. Orientation to Foundation practices is also required.
- vi) Ensure volunteers complete this training within their first month and record their completion in Raisers Edge.
- vii) Include a statement of accommodation on all position descriptions to ensure potential volunteers are aware that any special needs will be accommodated.

Volunteers shall be trained and effectively prepared to:

- i) Allow Associates with disabilities to use assistive devices and provide other measures wherever possible and when needed.
- ii) Welcome guide dogs or other certified service animals to accompany Associates in any area of the premises open to the public. Service animal owners must be prepared to provide vaccination records.
- iii) Encourage anyone with a disability to have their support person accompany them to attend an office visit, training session or special event – support persons are welcomed and not charged for event admissions.
- iv) Make adjustments to shared space (training room, waiting area, interview room) for assistive devices, a service animal, or a support person.
- v) Communicate with people with disabilities in a manner that takes into account the person’s disability, including alternate forms of communication (verbal, written, digital) based on individual need.

Conflict of Interest

Before or upon assuming their official duties, volunteers will sign a document certifying they have read and agree to abide by the Foundation's conflict of interest standards.

All volunteers shall immediately disclose to the Executive Director, in writing, any business, commercial or financial interest where such interest might be construed as being in real, potential or apparent conflict with their official duties.

In the performance of his/her duties, a volunteer must not:

- Place themselves in a position of obligation to persons who might benefit or appear to benefit from special consideration with respect to Foundation business;
- Have a monetary interest that would conflict with the discharge of the duties owed to the Foundation;
- Disclose, discuss, use, take advantage of, benefit or appear to benefit from the use of information not generally available to the public and which has been acquired during their official Foundation duties;
- Communicate with any level of government, or with any elected or appointed government official in relation to the business of the Foundation, unless they have specific Foundation authorization;
- Assist private entities or persons in their dealings with the Foundation where this could result in preferential treatment to any person;
- Directly or indirectly use, or allow the use of, Foundation property or information for anything other than officially approved activities;
- Volunteers must not commit the Foundation to any unauthorized expenditure or other liability and must ensure that all commitments are approved in accordance with the appropriate by-laws, regulations and policies including all appropriate consultations and approvals.

In the performance of his/her duties, a volunteer must:

- Avoid the appearance of favouritism in all of their dealings on behalf of the Foundation and not accept personal gifts from those doing business or seeking to do business with the Foundation;

In addition:

- Volunteers are required to consult with staff or the Executive Director whenever they have any question as to whether a particular circumstance may place them in a conflict;
- Volunteers who fail to comply with these standards during the course of their employment will be subject to such appropriate measures as may be determined by the Foundation, including dismissal;
- Where an individual fails to disclose a conflict or an interest according to this policy or according to other laws or regulations in Canada, the Foundation reserves all rights it may have to deal with the contract, conflict and individual involved.

Confidentiality Policy

Request for Confidential Information

Only the individual stated in the confidential information can access their own information. This is pursuant to the Privacy Policy and relevant legislation, including the Personal Information Protection and Electronic Documents Act and the Freedom of Information and Protection of Privacy Act.

Procedure for Breach of Confidentiality

In the event that a volunteer breaches confidentiality, the Executive Director will be informed and can follow the steps deemed appropriate based on the risk associated and the level of confidentiality breach. Depending on the nature of the breach and the volunteer's role, termination may be a potential outcome.

Dismissal Policy

The following are considered grounds for immediate dismissal:

- i) Illegal, violent and/or unsafe acts (will also involve St. Thomas Police Services);
- ii) Theft of property or misuse of Foundation funds, equipment, Associate information or materials;
- iii) Being under the influence of alcohol or drugs while performing volunteer duties; and,
- iv) Any action or behaviour that causes harm to Associates or members of the public.

All volunteers are subject to a probation period as determined by Foundation staff and written in their position description. During this probation period, the following procedure may not apply as volunteers may only receive one or no warnings for improvement, depending on the severity of the issue. Event volunteers are considered on probation for the duration of their first shift. The following procedure applies in all other cases besides probation and the immediate dismissal grounds listed above:

- i) Any instance of failure to meet the requirements of the role and/or misrepresent or contravene the mission of the Foundation will be documented in the volunteer's file. Each occurrence will be shared and followed up with the volunteer. A plan will be created to improve behaviour and ensure instances aren't repeated;
- ii) If such occurrences are repetitive or frequent, the volunteer will be given a warning in person and in writing (physical & digital). This warning will be recorded in the volunteer's file.
- iii) Volunteers will be given a set time period during which they should improve their behaviour. This time period will be noted in the written warning.
- iv) Volunteers may be dismissed if improvements are not made after two (2) warnings. Foundation staff are responsible for determining whether or not improvements made are sufficient.

- v) An appointment will be scheduled to inform the volunteer of the decision to dismiss them in person. The volunteer, their direct staff supervisor and one other member of the Foundation staff will be present in this meeting. The volunteer is invited to bring to the meeting another volunteer or any other person for support purposes.
- vi) The volunteer will be supplied with a confirmation of their dismissal in the form of a Dismissal Letter, signed by Foundation staff and the Executive Director in physical and digital formats.
- vii) Details of the dismissal will be recorded in the volunteer's file, and may impact future opportunities to volunteer with the Foundation. However, the volunteer may apply for another role at any time.

Feedback

Staff will provide and accept feedback in the following methods:

- i) Formal or informal pre-planned evaluation meeting (at appropriate interval);
- ii) Informal face-to-face check-in;
- iii) Annual review for long-term volunteers;
- iv) Exit interview (survey or in-person) for exiting volunteers; and,
- v) Group volunteer training sessions & events.

Evaluation of Volunteer

Evaluations of volunteer performance should cover the following areas:

- i) Fulfilment of role requirements and tasks;
- ii) Fulfilment of overall requirements including tracking shifts;
- iii) Communication; and,
- iv) Relationships.

Privacy

Consent Statement

By signing this document, I consent to my personal information being collected for the sole purpose as indicated. I acknowledge that my information will be used, safely stored, and protected by the Foundation for the duration that it is needed and/or my engagement as a volunteer.

Information Storage

All personal information will be stored in digital copy on the Foundation's secure shared drive, documented in Raisers Edge, and in physical copies in the relevant staff member's files. These physical files will be locked in a cabinet or filing space only to be accessed when necessary. Personal information will be kept for the following durations:

- i) Reference information will be kept until three (3) months after the interview process;
- ii) Volunteer general information will be kept for five (5) years from the end date of their engagement; and,

- iii) Role-specific information will be made anonymous one (1) year after the end date of a volunteer's engagement.

At the end of these terms, volunteer information will be destroyed or made anonymous for statistical purposes (in Raisers Edge, digital and physical files). Information is stored for these durations to ensure it is maintained during potential staff turnover and for future reference and proof of volunteer hour processes.

The Foundation collects and uses personal information from volunteers to support program delivery and for the following specific reasons:

- i) In the application and recruitment process of volunteers;
- ii) Maintaining contact with volunteers to ensure coverage of shifts and responsibilities and letting volunteers know of opportunities;
- iii) Satisfying statistical reporting requirements (such as locations of volunteers) detached from personal identifiers;
- iv) Accommodating volunteers with disabilities, illnesses and/or injuries;
- v) Supporting ongoing training and development; and,
- vi) Keeping volunteers aware of organization activities and events.

Disclosure

Under most circumstances, personal information will be used by staff to match roles and maintain contact with active volunteers. Certain information may be disclosed under the following circumstances:

- i) Foundation statistical requirements and reporting;
- ii) Regional volunteer location assessment; and,
- iii) Subpoena, warrant, court order or government request

The Foundation will not provide names and contact information of volunteers to other organizations or companies without prior explicit consent.

Personal Access

Upon written request and with reasonable notice, all current and former volunteers (within the aforementioned timeframes) can access their own personal information, affirm or challenge its accuracy, and request amendments when necessary.

Challenges to collection, use or disclosure of personal information are to be resolved immediately by the Executive Director and complainants notified of their right to seek additional information or file complaints with the Office of the Privacy Commissioner of Canada. All challenges and complaints will be responded to in writing.

Resignation

Resignation Provided with a Minimum of One Week's Notice

Volunteers who wish to resign from their position and do so with a minimum of one week's notice must write a letter stating their intention and the last date of volunteer service. The resignation letter should be forwarded to staff by email or provided in hard copy. Staff will acknowledge in writing receipt of resignation letters that are provided via email. A copy of the resignation and acceptance of resignation will be kept on the volunteer's record in Raiser's Edge for a minimum of three years.

Resignation Provided with Less than One Week's Notice

Volunteers who wish to resign from their position and do so with less than one week's notice must write a letter stating their intention and last date of volunteer service. The resignation letter should be directed to staff by email or provided in hard copy.

Staff will acknowledge in writing receipt of resignation letters that are provided via email. Volunteers may disclose a family or medical emergency as a reason for resignation to any Foundation staff member in person, over the telephone, or in writing. If an emergency is provided as the reason for sudden resignation, this will be indicated on the volunteer's record, and the volunteer may apply to return to the Foundation at any time. If no emergency is disclosed, the volunteer may not be welcome back to the Foundation for a minimum of three (3) years.

Role Creation

The Role Creation Process is as follows:

1. **Planning the Role**

When determining the need for a volunteer, staff will answer the following five questions:

- i) What will the volunteer do? – What are the tasks, activities, functions and duties of the role? Are they clear and concise, or more flexible and fluid? Are these tasks those that a volunteer should be doing as opposed to a staff member? Who will review these tasks?
- ii) When will the volunteer do it? – How often will the volunteer be needed? When will they volunteer and how frequently? How long will they be engaged with the organization? Is their schedule flexible and/or unfixed?
- iii) Where will the volunteer do it? – Does the role take place in the office? Can it be done from home or a separate location? Is there a satellite or partner location? Is the workspace accessible (if not already in the office)?
- iv) How will the volunteer do it? – Will the volunteer be using a computer (and is a computer/desk available)?

Will there be any special technology or materials that are unique to the role? Will there be special skills training for the volunteer to successfully fulfill the role?

- v) Why will the volunteer do it? – Is the need for this volunteer specific, or do they not have enough work to keep them busy? It is the staff's discretion to ensure that the volunteer's role will be meaningful and have an impact on the organization and its work.

2. Risk Assessment

Once a clear picture of the volunteer work and purpose has coalesced, staff must determine the potential risk of the volunteer role. Risk refers to the potential for a role – or the volunteer in the role – to bring harm (whether intentional or not) to the Foundation and its Associates. A risk assessment should be reviewed by senior management.

To determine risks, staff will answer the following questions:

- i) Who are the people involved? – Determine whether the Associate involved with the role will be at risk; this includes clients who are vulnerable such as children, seniors or clients with disabilities.
- ii) Who of these individuals may be in a position to harm the organization, its reputation or its stakeholders?
- iii) What is the activity and how does it affect potential risk? Certain activities and tasks may have higher risk than others (for example, being a spokesperson for the organization or providing driving services); be aware of the ways the activity may affect the risk or bring harm.
- iv) Where does the activity take place? The location itself may have obvious, physical risks, primarily if work will take place outside of the office. Some volunteer roles may involve client interactions that may not be supervised, and the planning of the role should take this risk into consideration.
- v) How often will someone oversee the activity? Consider the frequency of supervision (and level of supervision) according to the level of risk in the volunteer's activities.

Consider as many risks and potential challenges as possible to ensure that volunteer roles will not bring harm to the Foundation or Associates.

3. Hierarchy Management

Any staff member may determine the need for a volunteer to assist in program or project work. Appropriate management for the volunteer must be ensured. In some cases, volunteers may be managed by staff for scheduling, assignment of workspace and/or timekeeping. In other cases, Foundation staff may be responsible for all of these, as well as any other engagement and supervision requirements. Determine the individual(s) responsible: supervision, evaluation, scheduling, timekeeping and disciplinary action.

General Position Planning Tips

- i) It is important to note that the Foundation does not recruit “interns” unless an internship is paid (and therefore not a volunteer role) or is considered a learning opportunity accredited by an appropriate post-secondary institution.
- ii) No positions can be created to exclusively work with other organizations, such as volunteers recruited, screened and selected by the Foundation to then do their volunteer work with a different organization
- iii) Volunteer roles must adhere to the Ontario Human Rights Code.

Position Descriptions

Position descriptions may include the position title, purpose, activities, qualifications, requirements, screening steps, location, time commitment, training and orientation, and benefits. Per recommendations provided to Foundation subscribers, position descriptions should be broken down as follows:

- i) Title & Purpose/Objective
- ii) Activities (Tasks/Responsibilities/Duties)
- iii) Qualifications (Skills/Abilities/Experience)
- iv) Time Commitment, Start Date, Length
- v) Location
- vi) Screening
- vii) Orientation & Training
- viii) Dress Code
- ix) Benefits

Tips for effective descriptions:

- i) Link in the mission and information about the Foundation
- ii) Be detailed and concise
- iii) Acknowledge any pre-requisites alongside qualifications

Recognition Policy

The annual Volunteer recognition event will make every attempt to allow volunteers to socialize with each other and staff, demonstrate the important role of volunteers, and make volunteers feel appreciated. The format can change from year to year, but must take place annually.

When a volunteer leaves their position, Foundation staff will write a card to the volunteer and, if the volunteer has given more than one hundred hours, a Board member may be asked to become involved. On occasion, and especially for long-serving volunteers, the Executive Director may arrange for a staff social to celebrate the volunteer and the hours, effort and gifts they have given to the Foundation community. All volunteers who require letters confirming their hours will be given one. References will be provided by request after a minimum three month commitment. For special event volunteers, requests may be made to receive letters confirming their volunteer hours. Additionally, all special event volunteers will receive an email of gratitude within 48 hours of the event.

Screening Policy

All candidates will:

- i) Be made aware of the screening process;
- ii) Fill out an Application Form or follow Application Requirements from postings;
- iii) Submit additional requirements (such as resumes and cover letters, if required) based on their relevance to the role and as determined by the risk assessment;
- iv) Be interviewed in a single-or multi-phase process by one or more staff;
- v) Submit personal and/or professional references if required for the purposes of selection; and,
- vi) Attend orientation and training if selected for the volunteer role.

All staff recruiting volunteers will:

- i) Post application information (Form/Requirements) on the Foundation website, along with any additional requirements for the role as determined by the risk assessment;
- ii) Interview candidates who best meet the requirements of the role via phone and/or in-person;
- iii) Contact references if required for the purposes of selection;
- iv) Decline candidates who had been selected for interviews that do not meet the requirements of the role;
- v) Prepare or provide orientation and training for new volunteers that are selected, where applicable.

Every effort will be made to select volunteers, including Board of Director members, who represent the diverse community served by the Foundation.

Application

All application forms/requirements listed in postings will ask for:

- i) Candidate name
- ii) Contact information
- iii) Commitment length (if relevant)
- iv) Answers to application questions, if necessary
- v) An explanation of why volunteers would be a good fit/are interested in role (in lieu of cover letter)

Applications will be sent by e-mail, physical mail or in-person to the posting staff person or any other address provided in the posting.

Additional Requirements

Volunteer role requirements can include:

- i) Samples – writing, design, past experience, etc.
- ii) Resumé/CV – information about past work, volunteer and/or academic experience
- iii) Cover Letter – more robust explanation of someone’s purpose in the application
- iv) References – cannot be contacted without volunteer consent and not until the end of the process

To request police reference checks and vulnerable sector screenings, the following criteria must be met:

- i) There is a bona fide reason to request this check – examples include working with vulnerable clients (seniors, youth, people with disabilities), handling money, driving, or certain unsupervised programs
- ii) The check is not requested until the final round of the screening process (after interviews) to ensure the candidate is a right fit for the role; and,
- iii) Any information found on the check that is not relevant to the role or its requirements will be disregarded and have no impact on decision making

Interview

Development of interview questions, and the interview process, should be as follows:

- i) Interview questions are developed to discover the presence of skills, competencies and experience (where applicable) of candidates for the specific role, related to the duties, responsibilities and activities of that role;
- ii) Questions are applicable to all volunteers being interviewed for the same role, with accommodations made as necessary;
- iii) Detailed records are kept in Raiser’s Edge of each interview, including notes of comments made by volunteer candidates and interviewer concerns. This record is available to volunteers at any time.

Staff who are recruiting volunteers may opt for a phone/video interview first, or on its own, if the information and format will be applicable to the role.

References

References may be requested at any time, but consent must be provided from candidates when references will be contacted. This means references must be requested after the candidate has begun the screening process, and not at the beginning. **Do not contact references until the final stage of the screening process – when you have decided on the candidate you wish to recruit or you are between 2-3 candidates for the role.** Notes of the comments from reference conversations will be kept in the volunteer file, with contact information kept confidential.

The Foundation recommends the use of the following as acceptable references:

- i) At least one person who has served in a supervisory capacity with the volunteer in paid or unpaid settings;
- ii) At least one person who knows the volunteer personally and can vouch for their experience as listed;
- iii) Additional references based on the level of risk in the role; and,
- iv) Partners, spouses, family members and medical professionals of the volunteer may not be used as references.

Next Steps

Determine the timeline for the screening process if a second or third interview will be required. Any additional requests from volunteers should be equitable to all candidates of that stage in the screening process, such as police reference checks or samples.

Declining Volunteer Candidates

If a volunteer does not complete the screening process, supply the requested requirements, show evidence of ability to fulfill the duties of the role, and/or indicates behaviour not in line with the Workplace Disrespectful Behaviour, Violence, Harassment, Sexual Harassment, and Discrimination Policy, they will be declined for the role. Staff must also not rely on personal preference or opinion to decline a volunteer. Declined candidates are also entitled to a reason for this decision if they request it, based on the criteria of the role.