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Volunteer Policies and Procedures

for Toronto Organizations

**Preamble**

Volunteer Toronto’s volunteer policies and procedures were developed throughout 2016 by a team of Volunteer Toronto staff with input from the organization at large, volunteers and senior leadership. These policies were revised in 2019 and reflect the most recent and applicable municipal, provincial and federal legislation and have been enacted in the best interest of volunteers and the organization.

All policies use the following format:

* Purpose – a statement of why the policy exists
* Policy Statement – the direction/instruction of the policy
* Definitions – any applicable definitions to help understand this policy
* Responsibilities – who is responsible for what elements of the policy, both volunteer and staff
* Procedures – the actions, forms and instructions to carry out the policy

These policies have been generalized for editing and use by organizations across Toronto. All text in italics and highlighted should be replaced (such as *organization name*) or will reflect action required when editing and updating these policies for your use. You are free to edit, remix and re-write policies and any questions can be directed to info@volunteertoronto.ca

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| **Consolidated Accessibility Policy: Engaging Volunteers & Customer Service** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose**

To ensure that volunteers of any ability are engaged and recruited by *Organization Name* and that all volunteers are equipped to work and provide service to clients with disabilities.

**Policy Statement**

*Organization Name* strives to ensure that our service delivery supports the core principles of the Accessibility for Ontarians with Disabilities Act (AODA): independence, dignity, integration and equal opportunity. Volunteers receive appropriate training on the AODA, its Customer Service Standard and the knowledge to effectively serve all clients. Volunteers are engaged in an accessible recruitment process and are encouraged to identify any accommodations needed to fulfill their role effectively.

**Definitions**

“Disability” refers to mental, physical, learning disabilities, chronic illness, mental illness and anything that would prescribed as disability from an insurer.

“Customer” is similar to client for non-profit organizations, and refers to anyone receiving a service.

“Accessible” refers to 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” is the action that can be taken, when possible, to meet the ability needs of a client, volunteer or staff-person. For volunteers, accommodations will allow for the completion of non-essential duties when possible.

**Responsibilities**

Service delivery guidelines and policies are created in accordance with the Customer Service Standard of AODA to ensure all services can be delivered to all clients, including those with disabilities. This consolidated policy mirrors the staff-focused Human Resources policy on Accessibility and supports the Volunteer Screening policy.

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 clients.

Staff Responsibilities

It is the responsibility of volunteer supervisors recruiting, engaging and working with volunteers to be mindful of accommodations required by applicants who may have disabilities. Their screening process should be respectful of volunteers with disabilities. Training of volunteers should include a portion on the Customer Service Standard of the AODA to ensure clients can receive uninterrupted service.

Feedback from volunteers and clients will be connected via the organization website and in-office drop box to ensure that service delivery and volunteer engagement is accessible.

**Procedures**

Volunteer supervisors shall:

* Be asked to assess & identify the actual abilities needed for a volunteer position when posting opportunities.
* Ensure that volunteering premises are accessible and provide an accessible washroom; this applies to on-site and off-site facilities.
* Ensure that outreach, recruitment and other initiatives take place in accessible facilities and consider possible accommodation needs to communicate with those attending
* Check appointment, interview and registration information for accommodations of volunteers or clients ahead of meetings, sessions or other events.
* Provide training to volunteers on the Customer Service Standard via the Government of Ontario “[AccessForward](http://www.accessforward.ca/)” online training module. This training addresses techniques and knowledge required to effectively serve clients with disabilities, along with an orientation to *Organization Name* practices.
* Ensure volunteers complete this training within their first month, and record their completion in *volunteer management database.*
* Include statement of accommodation on all position descriptions to ensure potential volunteers are aware that their needs will be accommodated.

Volunteers shall be trained and effectively prepared to:

* Allow clients with disabilities to use assistive devices to access our services and provide other measures wherever possible and when needed.
* Welcome guide dogs or other certified service animals to accompany clients in any area of the premises open to the public.
* 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.
* Make adjustments to shared space (training room, waiting area, interview room) for assistive devices, a service animal or a support person.
* 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.

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| **Confidentiality Policy** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose**

To ensure the confidentiality of personal information of individuals who engage with *Organization Name.*

**Policy Statement**

*Organization Name* collects personal information from (*choose all or any of*) volunteers, staff, clients, 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 *Organization Name*. 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.

**Definitions**

“Confidential” means intended to be kept secret or kept in confidence to a specific individual.

“Personal Information” means 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 & contact, medical records, health conditions, education and work experience.

“Due Diligence” means using common sense and appropriate reasoning to determine whether and how information is used and decisions are made.

**Responsibilities**

Volunteer Responsibilities

It is the responsibility of volunteers to maintain the confidentiality of information seen, observed or worked with, especially that of *Organization Name* clients. 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 volunteer supervisors to ensure volunteers sign the confidentiality pledge (listed in Procedures) and that these signed pledges are kept on file for seven (7) years from the start of volunteer engagement (*duration not required, but recommended)*. Supervisors 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 *Organization Name* website. (*if relevant*)

**Procedures**

Volunteer Confidentiality Pledge

In my capacity as a volunteer at *Organization Name* I may learn personal facts about staff, volunteers, clients and member agencies. I may 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 *Organization Name* 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 *Organization Name* and that it continues in perpetuity.

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.

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| **Volunteer Dismissal Policy** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose**

To ensure that dismissal of volunteers is fair, equitable and reasonable based on the process outlines in this policy and the expectations, responsibilities and consequences of volunteer actions.

**Policy Statement**

*Organization Name* has the right to dismiss any volunteer whose actions have not supported the vision and mission of the organization and/or who has violated the organization’s policies, procedures, and position responsibilities.

**Responsibilities**

Volunteer Responsibilities

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

Staff Responsibilities

Volunteer supervisors will determine the responsibilities of each volunteer role – along with any associated expectations, boundaries, duties, and rules that are appropriate. Every volunteer supervisor 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, volunteer supervisors are responsible for following the procedures of this policy.

**Procedures**

The following are considered grounds for immediate dismissal:

* Illegal, violent and/or unsafe acts (*may also involve Toronto Police Services*)
* Theft of property or misuse of *Organization Name* funds, equipment, client information or materials
* Being under the influence of alcohol or drugs while performing volunteer duties
* Any action or behaviour that causes harm to clients

All volunteers are subject to a probation period as determined by their supervisor 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:

1. Any instance of failure to meet the requirements of the role and/or misrepresent or contravene the mission of *Organization Name* will be documented in the volunteer’s file using an Incident Report. 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.
2. 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.
3. 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.
4. Volunteers may be dismissed if improvements are not made after two (2) warnings. Volunteer supervisors are responsible for determining whether or not improvements made are sufficient.
5. An appointment will be scheduled to inform the volunteer of the decision to dismiss them in person. The volunteer, their supervisor and one other member of *Organization Name* 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.
6. The volunteer will be supplied with a confirmation of their dismissal in the form of a Dismissal Letter, signed by their supervisor and the Executive Director (*or CEO or President*) in physical and digital formats.
7. Details of the dismissal will be recorded in the volunteer’s file, and may impact future opportunities to volunteer with the organization. However, the volunteer may apply for another role at any time.

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| **Feedback & Evaluation Policy** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose**

This policy ensures that volunteers receive thorough and consistent feedback regarding their performance and have the opportunity to provide feedback to improve the volunteer program.

**Policy Statement**

Volunteers of *Organization Name* have the right to receive feedback from their supervisor 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 their supervisor on their role and work as well as the opportunity for an exit interview when they leave.

**Definitions**

“Feedback” refers to the volunteer and/or supervisor thoughts on the role, the program, the organization or any combination thereof.

“Evaluation” more strictly refers to an assessment of volunteer performance, how effectively the volunteer is meeting role expectations and if the volunteer role remains a good fit.

“Exit Interview” is a survey or conversation regarding factors related to a volunteer’s exit and/or additional information that *Organization Name* can use to improve the volunteer program.

**Responsibilities**

Volunteer Responsibilities

It is the responsibility of volunteers to provide immediate feedback when necessary, and/or request a meeting with their supervisor 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 – *Note: time frames will vary based on your organization*

It is the responsibility of volunteer supervisors to provide an informal feedback meeting after one (1) month of the volunteer in the role and to determine the appropriate length of time by which to assess volunteers through a formal evaluation process (on average, after three (3) months). On average, this should be after three (3) months with the organization. During this evaluation, volunteers can be given the opportunity to provide feedback on the role and the program to their supervisor. Volunteer supervisors 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 from volunteers when relevant to their work and program. All staff are responsible for working with and responding to feedback that affects the organization at large.

**Procedures**

Volunteer supervisors will provide & accept feedback in the following methods:

* Formal or informal pre-planned evaluation meeting (at appropriate interval)
* Informal face-to-face check-in
* Annual review for long-term volunteers
* Exit interview (survey or in-person) for exiting volunteers
* Group volunteer training sessions & events

Evaluations of volunteer performance should cover the following areas:

* Fulfilment of role requirements & tasks
* Fulfilment of overall requirements including tracking shifts
* Communication
* Relationships

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| **Incidents & Accidents Policy** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose**

To ensure the appropriate process for volunteers to follow in the case of incidents and accidents.

**Policy Statement**

Volunteers must report to their supervisor when an incident or accident occurs. Depending on the seriousness of the incident or accident, reports must be made immediately or at most within 24 hours of the occurrence. *Organization Name* staff and senior management will respond to the occurrence accordingly based on the severity and impact of the incident or accident. Emergency services will be contacted in the case of an accident threatening harm.

**Definitions**

“Incident” is a circumstance serious enough to require immediate attention to a volunteer, client 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 would be deemed by senior management to be problematic.

“Accident” is an unforeseen or unexpected occurrence that could lead to bodily harm or injury and/or damage to property. Accidents are without apparent or deliberate cause and can happen to anyone involved – volunteers, clients, staff and/or community members.

“Emergency services” refers to standard 911-response procedure, sending police, fire services and ambulance/paramedical services.

**Responsibilities**

Volunteer Responsibilities

It is the responsibility of volunteers to inform their supervisors of an occurrence as soon as possible using whatever contact means necessary. If the incident or accident occurs off-site, volunteers must follow the facility protocol as well, including potential additional incident reporting. In the case of a life-threatening accident, volunteers must contact 911 before reaching their supervisor or other staff.

Staff Responsibilities

It is the responsibility of volunteer supervisors and staff to be aware of incident and accident response protocol. In the event of an emergency, staff should contact 911 as soon as possible and provide as many details as is necessary. For volunteer incidents, supervisors and staff should refer to the Feedback & Evaluation policy and Volunteer Termination policy for additional guidance.

It is the responsibility of *Organization Name* senior management to ensure emergency preparedness information is available for all volunteers in responding to accidents.

**Procedures**

Incident Reporting

Volunteers may report an incident in any format they wish, as long as they provide the date, time, location, name(s) and details. Volunteer supervisors must compile a formalized incident report with any additional information they receive or deem appropriate. Use the following template:

**Date: Time:**

**Location:**

**Name(s) of individual(s) involved & roles:**

**Incident details:**

**Boundary broken (if any):**

**Recommendation:**

**Format:** Face-to-Face / E-mail / Phone Call / Note – **Has this happened before?** Yes / No

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Supervisor Signature Individual(s) Signature(s)

Accident Reporting

All parties present during an accident – volunteers and/or staff – are required to fill out an accident reporting form. Use the following format:

**Date & Time:**

**Location:**

**Report Completed By (& Contact Info):**

**Names of individual(s) involved:**

**Nature of Accident:**

Medical Emergency / Physical Injury / Property Damage / Assault or Violence / Other

**Details of Accident:**

**Circumstances Leading to the Accident:**

**Was there a supervisor present (and who was it?):**

**Action Taken (by you or another individual):**

**Who was contacted?:**

**Signature(s):**

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| **Privacy & Protection of Personal Information Policy** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose**

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

**Policy Statement**

*Organization Name* 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 *Organization Name*.

**Definitions**

“Personal Information” includes any information about an identifiable individual, including (dis)ability, age, religion, education, medical, criminal, employment, address, telephone number, e-mail address and views or personal opinions.

“Provincial and federal law” refers to 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 (where related to all other activities of *Organization Name*).

**Responsibilities**

Volunteer Responsibilities

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

Staff Responsibilities

*Organization Name* collects and uses personal information from volunteers to support program delivery and for the following specific reasons:

* Application and recruitment process of volunteers
* Maintaining contact with volunteers to ensure coverage of shifts and responsibilities and letting volunteers know of opportunities
* Satisfying statistical reporting requirements (such as locations of volunteers) detached from personal identifiers
* Accommodate volunteers with disabilities, illnesses and/or injuries
* Support ongoing training and development
* Keeping volunteers aware of organization activities & events

For all these and any purpose, it is the responsibility of the organization and volunteer supervisors 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.

It is the responsibility of volunteer supervisors and *Organization Name’s* senior management to determine how long they will retain volunteer information after the volunteer has ceased their engagement with the organization.

**Procedures**

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 *Organization Name* 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 *Organization Name’s* secure shared drive and in physical copies in the relevant volunteer supervisor’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 (*durations are not required; determine them as needed for your organization*):

* Reference information will be kept until three (3) months after the interview process
* Volunteer general information will be kept for five (5) years from the end date of their engagement
* 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 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 hours processes.

Disclosure

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

* Funder statistical requirements & reporting
* Regional volunteer location assessment
* Subpoena, warrant, court order or government request

*Organization Name* 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.

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| **Resignation Policy** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose**

To ensure that clear and reasonable notice is provided to *Organization Name* by volunteers voluntarily ending their engagement.

**Policy Statement**

*Organization Name* requires volunteers to provide their supervisor with notice of their resignation. It is expected that volunteers will give a minimum of one (1) week notice (preference for three weeks’ notice). Volunteers are not obligated to provide a reason for resignation. Volunteers who provide less than one week’s notice and do not disclose a family or medical emergency may not be invited back to volunteer with *Organization Name* for a minimum of three (3) years.

**Responsibilities**

Volunteer Responsibilities

Volunteers who wish to resign from their position should follow the procedures described below. Failure to follow this policy could result in the disruption of services at *Organization Name.*

Staff Responsibilities

Staff supervisors are expected to know and understand this policy and its associated timelines.

**Procedures**

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 the volunteer’s supervisor by email or provided in hard copy.

Staff supervisors 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 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 forwarded to the volunteer’s direct supervisor by email or provided in hard copy.

Staff supervisors 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 *Organization Name* 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 *Organization Name* at any time. If no emergency is disclosed, the volunteer may not be welcome back to *Organization Name* for a minimum of three (3) years.

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| **Role Creation Policy** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose**

This is a staff policy intended to inform role creation and position description preparation by organization staff. It is provided for volunteers for informational purposes.

To ensure the creation of meaningful, effective volunteer roles to support *Organization Name’s* activities by following a formal, standardized process that will ensure appropriate representation and volunteer assignments.

**Policy Statement**

*Organization Name* staff will create volunteer roles following the appropriate procedure, ensuring that all roles are assessed for risks, determined necessary for project work and will provide fulfilling opportunities for volunteers to help *Organization Name* achieve the mission. Position descriptions will be developed following a standard template that will be reviewed and updated regularly to ensure clarity and consistency.

**Definitions**

“Role creation” is the first step in determining the need for a volunteer, and should always be considered before writing the position description.

“Position description” is the 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 for recruitment purposes.

**Responsibilities**

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 (see: Procedures section). 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 senior management and the volunteer supervisor to determine and oversee the steps of role creation and the position description template, to be reviewed yearly.

The role planning process should include considerations for volunteer screening as stated in the Volunteer Screening Process. This will encompass risk assessment, determining screening requirements and necessary follow-up.

Failure to follow this policy and position description template prescribed herein will result in inconsistent volunteer recruitment and selection and a dilution of *Organization Name’s* mission in recruiting volunteers.

**Procedures**

The Role Creation Process is as follows:

1. Planning the role
2. Risk assessment
3. Hierarchy management
4. Position description

1. Planning the Role

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

1. 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?
2. 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?
3. 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 work-space accessible (if not already in the office)?
4. 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?
5. **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 supervisor’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, the supervisor 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 *Organization Name*, its clients or its staff and volunteers. A risk assessment should be reviewed by senior management.

To determine risks, the volunteer supervisor will answer the following questions:

* Who are the people involved? – Determine whether the client, volunteer, community member or staff member involved with the role will be at risk; this includes clients who are vulnerable such as children, seniors or clients with disabilities.
* Who of these individuals may be in a position to harm the organization, its reputation or its stakeholders?
* 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.
* 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.
* 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 organization, volunteers, clients, staff or community members.

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 the volunteer supervisor for scheduling, assignment of work space and/or timekeeping. In other cases, the supervisor 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 & disciplinary action.

General Position Planning Tips:

* It is important to note that *Organization Name* 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.
* No positions can be created to exclusively work with other organizations, such as volunteers recruited, screened and selected by *Organization Name* to then do their volunteer work with a different organization
* Volunteer roles must adhere to the Ontario Human Rights Code (see Discrimination Policy)

4. Position Descriptions

Position descriptions may include the position title, purpose, activities, qualifications, requirements, screening steps, location, time commitment, training & orientation and benefits. Per recommendation from Volunteer Toronto, position descriptions should be broken down as follows:

* Title & Purpose/Objective
* Activities (Tasks/Responsibilities/Duties)
* Qualifications (Skills/Abilities/Experience)
* Time Commitment, Start Date, Length
* Location
* Screening
* Orientation & Training
* Dress Code
* Benefits

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| **Volunteer Screening Policy** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose**

To ensure volunteers and staff are aware of the consistent screening process for all volunteers and that volunteers are able to apply to roles at *Organization Name* and expect a screening, interview and selection process that is fair, reasonable and accommodating.

**Policy Statement**

*Organization Name* 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.

**Definitions**

“Screening” refers to the entire process of volunteers applying to, interviewing with and being selected by *Organization Name.* Recruitment, selection, interviewing, application, reference-checking and candidate follow-ups are all included in this process.

“Human rights legislation” refers to the Ontario Human Rights Code, which protects Ontarians from discrimination in all its forms.

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

**Responsibilities**

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

Volunteer supervisors 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 senior management to determine a standardized application form and process (see: Procedures) 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 *Organization Name’s* mission in recruiting volunteers. Staff will be reminded of the policy and given additional assistance in volunteer screening if requested to comply to this policy.

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

**Procedures**

All candidates will:

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

All staff recruiting volunteers will:

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

The screening policy and procedure is in accordance with the City of Toronto’s statement of diversity and anti-discrimination policy. Every effort will be made to select volunteers, including Board of Director members, who represent the diverse community served by *Organization Name*.

Application

All Application Forms/requirements listed in postings will ask for:

* Candidate name
* Contact information
* Commitment length (if relevant)
* Answers to application questions, if necessary
* 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:

* Samples – writing, design, past experience, etc.
* Resumé/CV – information about past work, volunteer and/or academic experience
* Cover Letter – more robust explanation of someone’s purpose in the application
* 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:

* 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
* 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
* 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:

* 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
* Questions are applicable to all volunteers being interviewed for the same role, with accommodations made as necessary
* Detailed records of each interview are kept, including notes of comments made by volunteer candidates and interviewer concerns; this record is available to volunteers at any time

Staff 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.

Volunteer Toronto recommends the use of the following as acceptable references:

* At least one person who has served in a supervisory capacity with the volunteer in paid or unpaid settings
* At least one person who knows the volunteer personally and can vouch for their experience as listed
* Additional references based on the level of risk in the role
* 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 Human Rights & Anti-Discrimination Policy and Workplace Violence & Harassment Policy, they will be declined for the role. A supervisor 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.

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| **Volunteer Travel Reimbursement Policy** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose –** *Note: this policy is only for organizations that are able to reimburse volunteer travel*

To ensure volunteers are aware of travel reimbursement entitlements based on the work and location of their volunteer role.

**Policy Statement**

*Organization Name* is willing and able to provide volunteers with public transit cost reimbursements for each of their shifts or other travel related to volunteering at *Organization Name* if requested by the volunteer. Reimbursement will be provided for volunteer activities at or visiting the *Organization Name* office. In instances when special event budgets do not include public transit reimbursement, volunteers will be informed ahead of time. Volunteers will not be reimbursed for mileage, and may receive reimbursement for parking in pre-approved situations.

Definitions

“Public transit costs” is the current cost of PRESTO (2019: $3:00) or single fare (2019: $3.25). Reimbursement will be provided in the form of *format.*

“Shift” is the period of time, daily, that a volunteer is at the *Organization Name* office or a related *Organization Name* event.

**Responsibilities**

Volunteer Responsibilities

It is the responsibility of volunteers to inform their supervisors during training if they would like to receive public transit cost reimbursement while volunteering. Unless volunteers state otherwise, supervisors should assume that public transit cost reimbursement will be required. As public transit cost reimbursement is a significant cost to *Organization Name*, we request that volunteers who travel by bike, foot or monthly pass do not collect PRESTO fare for their shift.

If there is a financial barrier that impedes a volunteer from travelling to a volunteer shift, the supervisor and volunteer will work out a way to get the reimbursement to the volunteer before their shift.

Staff Responsibilities

No staff at *Organization Name* will draw attention to which volunteers do or do not receive tokens out of respect for each volunteers own financial situation.

**Procedures**

During training for their position, volunteers will sign a form indicating if they would like to be reimbursed for transit costs for their travel on shifts.

The following activities will entitle volunteers to receive public transit cost reimbursement:

* *List relevant activities*

*Fare media* will be handed out by the Operations Manager or the volunteer’s supervisor. It is the responsibility of the volunteer’s supervisor to ensure that the volunteer receives their public transit cost reimbursement. It is also the responsibility of the volunteer’s supervisor to inform the Operations Manager of the volunteer’s shifts and any changes to their shift.

Arrangements for parking reimbursement must be pre-approved with the volunteer’s supervisor and their manager.

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| **Workplace Violence & Harassment Policy** | |
| Final Draft – *Date* | Date Approved – *Date* |

**Purpose**

To ensure that volunteers engage with *Organization Name* in an environment that is free from violence and harassment, and that any good faith concerns may be made by volunteers without fear of reprisal or retaliation.

**Policy Statement**

Workplace Violence

*Organization Name* does not condone any form of violence in the workplace, including physical violence or sexual violence and verbal threats of violence or sexual violence made by or against volunteers. Breach of this policy by volunteers will result in appropriate disciplinary action, up to and including dismissal. Volunteers are expected to report any incident or threat of workplace violence to an *Organization Name* staff member.

Harassment

*Organization Name* promotes ethical and respectful service and volunteer engagement practices that incorporate equitable treatment for all volunteers. *Organization Name* will not tolerate, ignore, or condone any form of harassment (including sexual harassment) and is committed to promoting appropriate standards of conduct at all times. Harassment is a serious form of misconduct, which may result in disciplinary action up to and including dismissal. If such harassment occurs, *Organization Name* will take any steps available to ensure a harassment-free workplace, including barring the harasser from its facilities, where appropriate, or discontinuing engagements with volunteers.

Complaints

Volunteers have the right to report any good faith complaints to their supervisor. In the event that the complaint regards the supervisor, complaints should be reported to the manager of the supervisor.

Volunteers found to have deliberately made vexatious or malicious complaints, or to have issued complaints in bad faith, will be subject to appropriate disciplinary action up to and including dismissal.

**Definitions**

“Discrimination” means 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.

“Harassment” means 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*.*

“Incident” is a circumstance serious enough to require immediate attention to a volunteer, client 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.

“Sexual harassment” is defined as “(a) engaging in a course of vexatious comment or conduct against a worker in a workplace because of sex, sexual orientation, gender identity or gender expression, where the course of comment or conduct is known or ought reasonably to be known to be unwelcome, or (b) making a sexual solicitation or advance where the person making the solicitation or advance is in a position to confer, grant or deny a benefit or advancement to the worker and the person knows or ought reasonably to know that the solicitation or advance is unwelcome;” (Ministry of Labour)

“Workplace” is 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.

“Workplace violence” is the exercise of physical force by a person against a worker (volunteer or staff member), in a workplace, that causes or could cause physical injury to the worker, an attempt to exercise physical force against a worker, in a workplace, that could cause physical injury to the worker, or a statement or behaviour that it is reasonable for a worker to interpret as a threat to exercise physical force against the worker, in a workplace, that could cause physical injury to the worker.

“Protected grounds” refer to the seventeen (17) protected grounds of the Ontario Human Rights Code from which all people will not be discriminated against, in addition to two (2) grounds added for this policy.

**Responsibilities**

Volunteer Responsibilities

All volunteers are responsible for respecting the dignity and rights of their colleagues, clients, visitors and others receiving service from *Organization Name*. Volunteers will abide by these policies and the Ontario Human Rights Code. Volunteers have a right to equal treatment with respect to volunteering with *Organization Name* without discrimination or harassment because of the protected grounds.

Volunteers are responsible for informing an *Organization Name* staff member of any incident of violence or potential risk of violence that they experience or witness.

Staff Responsibilities

Staff are responsible for assessing potential risk associated with volunteer roles and informing volunteers of this risk. Staff will ensure that proper medical care is provided before investigating or reporting an incident if necessary, and track incidents of violence. Staff will cooperate with police in the event of an investigation.

All management staff and Board have the following general responsibilities with respect to human rights:

* Not engaging in behaviour that would constitute discrimination or harassment under the policy
* Setting and enforcing standards or appropriate workplace conduct
* Having thorough knowledge of the policy
* Being able to clarify what constitutes harassment and discrimination

**Procedures**

Statement on Complaints

Volunteers who lodge good faith complaints may do so without fear of retaliation or reprisal. Alleged retaliation or reprisals are subject to the same complaint procedures and discipline as complaints of discrimination and harassment. Complaints will be kept confidential, with disclosure only occurring if deemed necessary to adequately resolve issues.

Complaints issued that are found to have been made in bad faith will be subject to disciplinary action, up to and including dismissal.

Workplace Violence

Volunteers who witness a violent incident during the course of their duties are expected to make every effort to come to the aid of the victim. If volunteers feel they will be put in danger by doing so, they should remove themselves immediately from the vicinity and call 911. Volunteers should inform their supervisor as soon as possible after the incident, including if the volunteer is assaulted in the course of their duties. If the incident involves the supervisor, the volunteer should report to senior management.

When an *Organization Name* staff or board member receives a report of an alleged assault, they will make every effort to make sure the person who experienced the assault receives adequate attention, and, if necessary, medical care.

The option of reporting the incident to the police should be discussed with the person alleging the assault. The decision as to whether or not to make a police report should rest with the person alleging the assault. (See Incidents & Accidents Policy)

**Harassment**

Volunteers who feel they have been the target of harassment or discrimination have three options for managing the concern:

1. Direct Communication – to stop behaviour that is unwelcome with as little intervention by *Organization Name* as possible
2. Informal Complaint – to stop the behaviour that is unwelcome with the assistance of *Organization Name*
3. Formal Complaint – to stop the behavior that is unwelcome with the assistance of *Organization Name*, with the possibility of taking legal action against the respondent; this process is complainant-driven.

In the case of any option, records regarding the incident, complaint and process will be retained for both complainant and respondent.

1. Direct Communication

In some instances, informing the individual that their behavior was unwelcome will resolve the issue. The complainant may wish to communicate directly with the person who behaved inappropriately. *Organization Name* supports the choice of volunteers to manage incidents of harassment or discrimination by communicating directly with the person who made the unwelcome remark or action.

If they elect to follow the Direct Communication option, volunteers will:

1. Inform their supervisor of the incident and the decision to follow this option. If the harassment or discrimination involves the supervisor, the volunteer should report to the manager of the supervisor.
2. Communicate with the person who made the unwelcome remark or action, in person or through email.
3. Describe the incident and why it is a problem.
4. State that the behavior is unwelcome and inappropriate.
5. Maintain documentation of the communication (email or personal notes, including details about the incident, names, dates and times, and the names of any witnesses)

2. Informal Complaint

If a volunteer who feels they have been the target of harassment or discrimination does not wish to communicate directly with the accused, or if the complainant has attempted this option and the issue has not been resolved, they can elect to lodge an informal complaint.

Steps for the Informal Complaint procedure are as follows:

1. The complainant should report the incident to their direct supervisor. If the incident involves the direct supervisor, the volunteer should forward their complaint to the Executive Director.
2. If the *Organization Name* representative determines the incident violates the Harassment Policy, the complainant may elect to:
   1. have a representative from *Organization Name* (staff or Board member) intervene on their behalf and discuss the issues with the accused, or;
   2. have a representative from *Organization Name* facilitate a discussion between both parties to reach a resolution.

The complainant may choose to escalate to the Formal Complaint procedure or to stop the process at any point in the proceedings. If the complainant wishes to stop the process, a written document stating this must be provided to *Organization Name.*

3. Formal Complaint

The complainant may issue a formal complaint at any time. Formal complaints must be made in writing to the volunteer’s supervisor or the manager of the volunteer’s supervisor. If the complainant wishes to withdraw a complaint, they may do so at any point in the process by informing *Organization Name* in writing.

The following steps will be observed in the event of a Formal Complaint.

1. Volunteers will report the complaint to their supervisor in writing. If the complaint involves the supervisor, the volunteer will report to the manager of their supervisor . The volunteer supervisor or manager of the supervisor may escalate the complaint to the Executive Director if necessary.
2. If the complainant and respondent work together, the complainant will be consulted about rescheduling shifts in order to avoid overlapping shifts. *Organization Name* will make every effort to make reasonable accommodations for the complainant, including providing the option for remote volunteering or cancelling shifts.
3. An *Organization Name* staff member will be assigned to conduct a thorough and objective investigation of the allegation. This staff member will be from a department where the volunteer does not assist. The Executive Director will make a call for staff members to take on this role, and an appointment will be made by the Executive Director. If no staff members offer to take on the role, the Executive Director will assign a staff member to this duty.
4. The investigator will inform the respondent of the complaint in writing.
5. The investigator will conduct the investigation within a reasonable amount of time, but no more than two (2) weeks. The investigation may include: interviews with the parties and/or witness and a review of e-mails and other written materials
6. Once the investigation is complete, the investigator will decide if there is sufficient evidence to determine guilt. If:
   1. A determination of guilt is made, the investigator will decide the repercussions, up to and including dismissal from volunteer duties with no option to return in the future, in accordance with the Volunteer Dismissal Policy (if the respondent is a volunteer), and notifying the police. A record of the complaint and the result of the investigation will remain on the file of the respondent for a minimum of three (3) years if the respondent is a volunteer.
   2. The respondent is determined innocent and the respondent is a volunteer, a record of the complaint and the result of the investigation will remain on the volunteer’s file for a minimum of three (3) years.
   3. There is insufficient evidence to determine guilt or innocence, no further action will be taken by *Organization Name*. A record of the complaint and the result of the investigation will remain on the file of the respondent for a minimum of three (3) years if the respondent is a volunteer.
7. If the complainant is a volunteer, a record of the complaint will remain on the complainant’s volunteer file for a minimum of three (3) years. (*timeframe is not required*)