

Volunteer Screening Policies Guidebook



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IMPORTANT INFORMATION

This guidebook is intended to provide general information on volunteer screening policies and programming. However, nonprofits vary considerably in their structure, mission and values, and operations. Therefore, the information in this guidebook may not always be applicable to the needs of individual organizations.

This guidebook is current only as of the date of publication and does not reflect subsequent changes to legislation or policy.

Volunteer Alberta does not offer legal or professional advice. Therefore, you may wish to seek professional advice to address specific concerns and issues.

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Volunteer Alberta
Suite 101 Elm Business Park
9426 51 Ave NW

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Introduction

Welcome to the Volunteer Screening Program’s Volunteer Screening Policies Guidebook! This tool was developed for you to support you whether you’re new to policy writing or looking to update your current volunteer screening policies. Having volunteer screening policies can empower your organization to focus on your mission and vision. By creating volunteer screening policies that effectively match volunteers to roles they are passionate about and can safely perform, your organization can more effectively drive impact and create change through your volunteer programming. Like any policy, volunteer screening policies provide direction and clarity, so when we have decisions to make, we know how to move forward.

Definition of Policy and Procedure

Policies and procedures are both critical elements to support the programming of a nonprofit organization. They both provide direction and shared understanding about the organization’s operations. However, there are some key distinctions that differentiate them.

Characteristics of a policy	Characteristics of a procedure
Broad statements that outline the organization’s intent, principles, and expectations (e.g. why volunteer screening matters and what must be achieved).	Specific actionable instructions that describe how to carry out a policy (e.g. step-by-step screening workflow, descriptions of sequences, or outlining progression of events).
Provide consistent guidance across the organization, reviewed less frequently, and usually require leadership or board approval.	Operational in nature; can be updated more frequently as tools, roles, or practices evolve.
Secondary to an organization’s guiding legislation and bylaws.	Secondary to policies.
Define rules and boundaries, and the organization’s position aligned with legislation, bylaws, mission, vision, objectives, and risk tolerance.	Detail “who does what, when, and how,” including sequences, timelines, forms, and decision points.
Describe the “what” and “why” (the outcomes that must be met), not the step-by-step process. Support consistency and training by outlining the exact steps staff or volunteers need to follow.	Explain how to apply, document, and monitor compliance with the policy.



While the characteristics above are helpful, it's important to note that "policy" is not a universally fixed term. Different organizations interpret and structure policies differently based on their size, risks, governance requirements, and culture. As a result, policies will naturally look different for a small community-based group than for a large charity.

At its core, a policy expresses the organization's expectations, intentions, and boundaries. Effective policies clearly state what is and isn't acceptable within the organization's context, and they are most meaningful when informed by the community members affected by them - volunteers, clients, partners, staff, board members and others.

In [By Definition: Policies for Volunteer Programs](#) (1997), Linda Graff describes four different policy types that are useful in thinking about policy. Policies can be:

- **Rules** that state what is okay and not okay.
- **Statements of Belief** that describe what the organization generally understands or holds to be true.
- **Risk Management** efforts that respond to particular hazards or dangers.
- **General Aids to Program Effectiveness** that are meant to help particular programs function properly.

By contrast, procedures use a more directive tone. They provide step-by-step instructions for how to carry out specific tasks or enact the rules contained in policies. Procedures are generally operational documents. They tend to evolve more frequently as tools, roles, or work processes change.

While policies and procedures are ideally separate - policies describing what must happen, and procedures describing how to make it happen - many organizations combine elements of both in a single document. The key is to ensure clarity: staff and volunteers should always be able to understand the organization's expectations and how to act on them.

Ultimately, each organization can decide how to distinctly separate policies and procedures. When making this decision, some helpful things to consider include:

- What level of consistency do you need from your staff and volunteers? How much detail would be needed to achieve that?
- Is the content meant to provide stable guidance? Then it's likely a policy.
- Might the content change with some regularity? Then it's likely a procedure.

What are Volunteer Screening Policies?

When we consider what volunteer screening policies should look like, we need to be clear on what volunteer screening is. According to Public Safety Canada's [Best Practice Guidelines For Screening Volunteers](#) (2008), "screening is a process performed by an organization to ensure that the right match is made between the work to be done and the person who will do it. Screening serves to create and maintain a safe work environment." In practice, screening is both a risk-management strategy, and a way to support safe, meaningful participation for everyone involved.

Volunteer screening policies are a formal document that outline how your organization approaches screening and the type of culture you want your volunteer program to reflect. It provides structure, direction, and clear expectations so that staff, volunteers, and community members understand how screening decisions are made.

While overall organizational policies should apply to everyone connected to your organization, individual policies may apply to specific groups. Volunteer screening policies should apply to volunteers, staff responsible for onboarding or supervising volunteers, and anyone impacted by volunteers' work. The policies should outline the principles and decision-making guidelines your organization will follow when screening volunteers, including how to respond to situations that require additional consideration or risk assessment.

For even more information on the writing of volunteer policies overall, refer to the book [By Definition: Policies for Volunteer Programs by Linda Graff](#).

TIP: Volunteers should absolutely be involved in the creation of volunteer screening policies, but they should also be considered in the creation of other organization-wide policies too (e.g., organizational harassment and discrimination policies).



A Helpful Concept to Support Policy Development

At Volunteer Alberta, we use IDEAS (Inclusion, Diversity, Equity, Accessibility and Social Justice) to help frame our philosophies and decision-making. Throughout this document, you will see IDEAS considerations for different policy categories. We encourage you to use IDEAS as a guiding lens for your policy development to consider the many impacts and perspectives your policies have.

IDEAS work is important because it creates a space for volunteers to feel welcome and included in your organization and what you hope to achieve. Historically, volunteering hasn't always been an equitable activity. Through [informal and formal mechanisms](#) of exclusion, some people are not provided the same opportunities to volunteer as others (Bonnesen, 2019). A commitment to IDEAS can help volunteers feel welcome in your organization.

Instead of having a single policy outlining IDEAS, we invite you to improve each individual policy you write with the consideration of IDEAS. As you make your way through this guide, we'll provide you with starting points to help flesh out policy in this way.

For more learning about IDEAS and the history of volunteerism, visit [The Centuries Old Invisible Forces That May Be Undermining Your Positive Volunteer Engagement](#) (Medium, 2020) and the Professional Association of Canadian Theatres' [EDI Library](#).

How to use this resource

This resource is meant to be a guide to support you and your organization in producing or updating volunteer screening policies. It is a place to start, draw inspiration from, and gain some knowledge and insights. It is meant to spark thinking, rather than serve as a direct template. Throughout this resource, you will find several reflective questions to guide your policy-writing process under the different possible policy categories. Every policy sub-category will include a description of the policy and what it should cover, considerations like IDEAS and legislation to think about, an example of what the policy could look like to inspire you, and additional resources to assist you. This resource offers a range of examples to help you update, review, or develop meaningful volunteer screening policies. Because each organization is unique, not all policies listed will apply in every context, and this is not an exhaustive list. You and your community will have the greatest insights into what will work best for your organization.



***This is not a document for governance. Board policies are often developed separately from volunteer or personnel policies. This document is intended for guiding volunteer screening policies, not broader organizational policies.**

The Policy Writing Process:

Below, you will find a series of phases to help you with your volunteer screening policies development process. We recommend you start with Phase 1: Groundwork and move forward through the phases from there so you have a solid foundation to build from. You may need to go back and forth between phases since policy writing is often non-linear, but the time and thoughtfulness you put into the start of the process helps with success later in Phase 5: Implementation and Ongoing Evaluation!

Phase 1: Groundwork

Risk Assessment:

A great place to start volunteer screening policies writing is with a risk assessment. A risk assessment helps you plan and prepare for potential risks that are unique to your organization. VA has multiple resources to help you identify risks at your organization, but we recommend maintaining a “risk-assessment mindset” where you are always on the lookout for potential risks. Volunteers and program participants are also great at providing information to inform your risk assessment process.

- [Position Description Risk and Policy Considerations Template \(Sept. 2018\)](#)
- [Developing Screening Policies and Assessing Risk webinar \(Feb. 2021\)](#)
- [Volunteer Risk Assessment Matrix \(Apr. 2022\)](#)
- [Virtual Volunteer Risk Assessment Matrix \(Apr. 2022\)](#)
- [Risk Assessment Checklist \(Mar. 2024\)](#)
- [Risk Assessments and You Webinar \(Nov. 2025\)](#)

Community Engagement:

Before writing any policy document, we recommend researching and collecting feedback from your community. Are there other organizations similar to yours that you could review their policies? Is there a survey or focus group you could facilitate to gain wisdom from volunteers on what they want to see in policy? Have you met with other staff or board members to hear their thoughts on your volunteer screening policy? Whatever your process is, it is important to listen to those most impacted by the policy you’re hoping to create/update. Even if a policy is “complete,” feedback may come your way that might suggest an edit to policy.

TIP: Policy should always be reviewed on a scheduled basis. How can you include volunteers and community members in the process?

Phase 1:
Groundwork

Legislation Review:

All nonprofits are guided by different legislation. It's important to know what legislation applies to your organization before writing policy. What legislation applies to your organization and how does it impact you? Make sure to review and become familiar with relevant legislation.

Examples of Legislation: Protections of Persons in Care Act, Early Learning and Child Care Act, Societies Act, Canada Not-For-Profit Corporations Act, Housing Act, etc.

TIP: Make sure to always check with your insurance provider and a legal representative to see if you are required to include any statements or steps in your policies and procedures.

Phase 2:
Organizational
Reflection (your
philosophy of
volunteering)

Volunteer screening policies should grow out of who you are as an organization. Your mission, vision, and values shape how you think about volunteers and the kind of environment you want to create for them. Volunteers give their time and energy generously and it's important for them to know the heart of the organization they are joining.

This phase is about pausing to reflect on the beliefs and assumptions that guide your work. What do you believe about volunteers? How do they help advance your mission? What does safety, trust, and care look like in your context? These reflections don't all need to appear in the policy itself, but they help guide the choices you make as you write it.

There are many ways to share your mission and vision with volunteers— through visuals, short videos, simple landing pages, or even a small glossary that explains key ideas in accessible language. These tools aren't part of the policy, but they help volunteers feel oriented, welcomed and connected.

When volunteers understand the "why" behind your organization and your approach to screening, they are more likely to feel a sense of belonging and stay engaged.

Phase 3:
Sensemaking and
Definitions

Organizing:

By this point, you've done a lot of thinking and gathering of information. Now it is time to start organizing your findings and thoughts so they can flow into the creation of your volunteer screening policies. Phase 1 gave you foundational knowledge while Phase 2 shaped the narrative of how volunteers support your organization. Use that information to guide the rest of the process. If you ever feel stuck, reflect back on Phase 1 and 2.

Phase 3:
Sensemaking and
Definitions

Position Descriptions:

Position Descriptions: Now that you have that foundational knowledge of organizational safety and philosophy, you can begin to develop volunteer position descriptions. Volunteer position descriptions help differentiate the different categories of volunteering your organization offers.

The first reason position descriptions are important is that they make it easier to manage risk by analyzing the specific risks for specific volunteers. Knowing where these risks exist makes it easier to respond to them, through actions like effective policies.

The second reason descriptions are important is that they provide liability coverage for volunteers under the Freedom to Care Act (Government of Alberta, accessed February 2026). The Freedom to Care Act provides broad liability coverage for volunteers working within the scope of their role as a volunteer. However, to define the scope of their role, it's best to have it formally written down and understood by the volunteer.

Thirdly, the tasks the volunteers are completing and the environments they work in will likely influence what you will need to include in your volunteer screening policies. Know what you expect from the volunteers, and what policies you will need to develop so they can be safe and successful in their roles.

Definitions:

It is important to define who the policies will impact which you can include in a preface or introduction to your policy document. Below are some examples of different groups who could be impacted by the policy, but you should adapt to the groups your organization works with:

“Staff” is anyone paid to work at the organization including salaried, hourly, and contracted positions.

“Volunteer” is anyone who donates their time and energy to the organization in an unpaid position. You should make it clear if anyone receiving an honorarium is a staff member or a volunteer according to your policy. It may be a good idea to check with an employment lawyer before making this distinction.

“Clients” include beneficiaries of your programs.

Phase 4:
Writing

You're ready to start writing:

Policy writing is a learned skill that takes practice, and there are many ways to begin. Here are a few approaches to help you get started:

First, gather the background research and notes you collected from the previous phases. Then, open a blank document and respond to some or all of these questions (writing out your answer will help shape your draft):

- What is the policy or need this policy is addressing?
- What existing policy templates, formats, or conventions does your organization use?
- Who is this policy for, and how much information will they need?
- When and why would someone come back to this policy for guidance?
- What legal, privacy, or bylaw requirements must it address?
- How does this policy align with your organization's mission, values, and approach to safety and inclusion?
- Who will need to review, edit or approve it?

From here, you can begin by outlining the key components of the policy. Most policies include elements such as purpose, scope, definitions, key policy statements, roles and responsibilities, related documents, and timing for a review of the policy. Create a simple bullet-point skeleton to map out these components.

Next, you can begin to expand your bullets into sentences and short sections. Shape your paragraphs, add clarity and nuance where needed, and make sure the tone is welcoming, clear, and accessible.

Edit your draft in passes, focusing on different editing phases for each pass. The [2024 Professional Editorial Standards \(2024\)](#) created by Editors Canada outlines four editing phases:

- Structural editing
- Stylistic editing
- Copy editing
- Proofreading

TIP: To ensure your policy is accessible and useful, write in plain language and avoid jargon. Read more [here](#).

Phase 4:
Writing

The Structure:

Policies should be easily understood by everyone who reads them. A good way to ensure this happens is to include the following in each policy:

- Preamble: Include a small section at the top of the policy answering a few key questions, such as: Why does this policy exist? Who is it for? Why does it matter? What risk is this addressing?
- The body of the policy: This section can vary in form depending on the policy, but it should clearly articulate the rule, belief, risk management strategy, or general aid to program effectiveness being proposed. This can be organized in a series of numbered sections and bullet points, depending on how extensive the policy is.
- Timestamp: Make sure to include when the policy was written and last reviewed. You may also consider including who is responsible for reviewing the policy and the frequency with which it needs to be reviewed.
- Links to relevant documents, forms, and procedures.

Phase 5:
Implementation and
Ongoing Evaluation

Your policies are ready to be implemented! How will you communicate the volunteer screening policies with the volunteers, staff and anyone else impacted by the policy? Depending on your audience, you may want to have an info session or a presentation that goes through an overview of what's in the policies, why they're important, who it impacts, and how to access it.

When it is time to update your organization's volunteer screening policies, what is the process? Whose responsibility is it to make sure that policies are implemented, reviewed, and updated as needed? The review process may look different to different organizations. Some may look at policies with a committee that regularly reviews them as a group. Some organizations may require that volunteers solicit community feedback in updating policies. Think about what your organization needs to evaluate a policy, and what is the best approach to gather that information.

Sometimes policies need to be updated before their review date due to unforeseen circumstances. Any policy should have the unique ability to adapt to the needs of the community it impacts. If you need to update before the official review date, make sure to follow any processes your organization has laid out. Again, policies are meant for the community, and so it's important the community is involved in the creation and review process.

Volunteer Screening Policies

Below, you'll find a variety of individual policy descriptions and examples listed in alphabetical order. Although every organization is different, your policies should at least include a combination or variation of the policies below.

When we talk about volunteer screening policies, we're not necessarily talking about one specific policy or even a formal suite of policies labeled "Volunteer Screening Policies." We are talking about a variety of separate policies that all have implications on how you screen volunteers engaged with your organization. Do not feel the need to group these policies together in the final policies document if it does not make sense for you. Use this resource as a tool to flesh out the volunteer screening process through a variety of policy documents.

Code of Conduct

A code of conduct policy outlines the expectations and behaviours that are aligned with your organization's values and expectations. It can help ensure a safe, respectful and inclusive environment for both volunteers and community members. A code of conduct policy also guides volunteers in understanding the consequences of misconduct. Overall, it supports consistency, trust, and accountability.

- Considerations to help you write this policy:
 - Do you need separate codes of conduct for different groups of volunteers? Some volunteers may have different responsibilities than others.
 - A code of conduct can be daunting to write, as there are many considerations you might need to make. Try to isolate general behaviour that isn't covered in other policies, using the code of conduct as a high-level document that describes what is and isn't okay in any circumstance, instead of specific circumstances.
 - If you find you still need a code of conduct for specific circumstances, you can try developing program-specific codes of conduct or codes of conduct for particular jobs. When possible, though, try to keep the code of conduct high-level rather than trying to cover every eventuality through your code(s) of conduct.
 - A code of conduct can be described differently depending on the organization or supplemented by other community agreements.
 - If you can, confirm with a legal representative who should be signing a code of conduct/volunteer agreement.

- Examples of policy statement
 - The organization is committed to maintaining a welcoming and safe environment for everyone. We value and respect all participants, embrace diversity, and expect kindness, openness, and consideration from all community members involved in programming. The organization acknowledges historically excluded communities and remains dedicated to continual learning and improvement. Individuals are expected to uphold these values and policies, and failure to do so may result in dismissal.
 - Risk management is a shared responsibility. All staff and volunteers are responsible for reducing risk wherever possible. This could include, but is not limited to
 - Complying with all agreements and contracts made between yourself and other community members,
 - Following all applicable safety procedures established by the organization; and
 - Reporting theft or fraud to the executive director or the board,
 - Volunteers that have been found by organization staff to have violated the Code of Conduct three times will be dismissed from their volunteer role.
- Additional resources
 - [8 Examples of Workplace Code of Conduct](#) (Indeed, 2025)
 - [Establishing A Code Of Conduct Policy: Sample Included](#) (HR Intervals, accessed Jan. 2026)

Confidentiality and Privacy

A confidentiality and privacy policy should apply to every individual who has access to sensitive or personal information related to the organization—this includes employees, volunteers, board members, contractors, donors, and clients. Such a policy establishes clear expectations for how information must be handled, stored, shared, and protected. By outlining these responsibilities, the policy not only safeguards the organization’s internal operations and reputation but also ensures that the personal information of everyone connected to the organization is respected and secure.

- Considerations to help you write this policy:
 - Outline relevant rules and regulations from the [Personal Information Protection Act](#) (Government of Alberta, 2025) and [The Personal Information Protection and Electronic Documents Act](#) (Privacy Commissioner of Canada, 2024) in the context of nonprofits. Note, however, that PIPA applies only to nonprofit organizations within the scope of their commercial activities. For more information, visit [Privacy Law Primer for Alberta Charities and Non-Profits](#) (Miller Thomson, 2024).
 - Who at your organization currently has access to personal and private information? Do you need to take steps to limit the number of people with access to confidential information?

- Do you require personnel to sign a confidentiality agreement? How long is that agreement in effect?
- How can you protect community members' information?
 - Is it possible to password-protect particular files?
 - Can a trusted staff or volunteer be responsible for redacting identifying information such as social insurance numbers, addresses, or contact information?
 - Can digital files be stored in a shared drive that only select people have access to?
 - Do physical files need to be stored in a particular way, such as a locked filing cabinet?
 - Are there preventative security measures you can take, like cybersecurity training, to ensure sensitive information doesn't end up in the wrong hands?
 - Do you have a managed IT company? They may be able to recommend other digital security measures for your organization to codify in policy.
- Examples of policy statement
 - All volunteers who have access to client and personnel information are required to sign a confidentiality agreement before the start of their first shift. The confidentiality agreement will be locked in the main office filing cabinet and is effective indefinitely.
 - All volunteers responsible for maintaining donor and client lists will obtain written consent from donors and clients prior to collecting their personal information, such as emails, phone numbers, and banking information. All staff or volunteers responsible for collecting personal information from volunteers, donors, or clients will be granted access to a shared confidential Google Drive and will be expected to only store and handle digital files containing personal information within that shared drive. This shared drive will not be shared with anyone who does not need access to personal information to perform their job duties.
- Additional resources
 - [Sample Staff Confidentiality Agreement](#) (Nonprofit New York, 2023)
 - [Personal information for non-profits and other organizations](#) (Government of Alberta, accessed Jan. 2026)
 - [Confidentiality Policy](#) (Volunteer Toronto, accessed Jan. 2026)

Dismissal

A dismissal policy should include grounds for volunteer dismissal, who is responsible for due process, and links to any procedures and processes personnel must follow. A dismissal policy will help protect your organization and clarify for volunteers how they will be treated even if/when their volunteer role comes to a close.

- Considerations to help you write this policy:
 - What are the grounds for dismissal? How is it communicated to the volunteer?
 - Consider any legal repercussions. There's a possibility that your organization could be sued for wrongful termination. If needed, discuss the dismissal with a legal professional if the conditions for the volunteers' dismissal are not clearly covered in policy or bylaws.
 - Good practice suggests that the volunteer shouldn't be surprised when they are dismissed. The Volunteer Coordinator or their supervisor should be having conversations to support their improvement if possible before finalizing the dismissal, and the volunteer should be clear what the grounds for dismissal are when they start to volunteer, based on the boundaries laid out in policy and training.
 - Consider the impact a dismissal may have on other volunteers. We recommend being transparent with other volunteers without disclosing personal details. It might be a good time to remind everyone of policies and procedures while emphasizing your organization's mission and vision.
- Example of policy statement
 - Grounds for dismissal include:
 - Breaching boundaries as outlined by policies or role responsibilities
 - Unsafe, violent, or illegal behavior
 - Substance use while performing tasks
 - Consistent failure to meet responsibilities
 - The Volunteer Coordinator will work with relevant personnel to support the volunteer in their work. This includes, but is not limited to, role changes and increased supervision. If the volunteer is dismissed from their role, the Executive Director will send the volunteer a letter on organization letterhead notifying them of their dismissal and the reason for dismissal. The Volunteer Coordinator and the volunteer are to coordinate a time for an exit interview either online or in-person if the volunteer chooses.
- Additional resources
 - [Volunteer rights? Ontario Court finds long term volunteer "wrongfully terminated"](#) (Dentons Canadian Employment & Labour Law, 2024)
 - [Volunteer Dismissal Policy](#) (Volunteer Toronto, accessed Jan. 2026)

Leaves of Absence

This policy can outline several key expectations and procedures to ensure clarity for both volunteers and the organization. This may include specifying how far in advance a volunteer must provide notice when requesting time away, as well as the method for submitting that request. The policy can also clarify who is responsible for arranging coverage during the volunteer's absence. Beyond logistics, a well-designed policy demonstrates the organization's commitment to supporting volunteers as whole individuals by acknowledging that personal, family, cultural, health, and work obligations may arise.

- Considerations to help you write this policy:
 - This might be a policy that overlaps with policies for paid staff. It is important that volunteers know if there are policies that are the same for them as staff and that you can clarify what is applicable to them. For example, leave may be paid time off for staff, but it obviously wouldn't be paid for a volunteer role. It is important that volunteers understand what the policy covers and that you can update and adapt to the needs of your community.
 - Is there flexibility in a volunteer role to accommodate for religious holidays and observances? Are you and your organization aware of some of the cultural days that people observe that may be different from your own?
- Example of policy statement
 - Our organization is committed to supporting volunteers when they need time off. The volunteer should notify the Volunteer Coordinator at least 2 weeks prior to the time they need off when possible. The Volunteer Coordinator will work with other staff and volunteers to find coverage.
- Additional resources
 - [Interfaith Calendar](#) (National Conference for Community and Justice, 2025)

TIP: Some traditions will not have set days for certain religious observances!

- [Religious Observance Dates 2024-2026](#) (University of Calgary, accessed Jan. 2026)



OHS/Workplace safety

[The Occupational Health and Safety \(OHS\) Act](#) (2024) is Alberta's legislation that covers workplace health and safety. An Occupational Health and Safety policy outlines how your organization complies with OHS standards, how paid and unpaid personnel, including volunteers, are expected to interact with OHS legislation, determining your Health and Safety representative or committee, and any other steps if a volunteer decides they feel unsafe and refuses to complete a task.

- Considerations to help you write this policy:
 - Do you have a Health and Safety Program? Do you have a Health and Safety representative or committee? Do volunteers know who that person is and how to get in contact with them?
 - Do you have a plan in place if a volunteer doesn't feel comfortable completing a task? Do volunteers understand they can say no to a task they do not feel comfortable completing?
 - Do volunteers work with potentially hazardous equipment or materials (e.g. chemicals; gardening tools; sports equipment; vehicles like golf carts, Zambonis, or front-end loaders)? See the risk assessment section on page [26](#).
- Example of policy statement
 - Volunteers have a right to a safe workplace and a right to refuse unsafe work as mandated by the Occupational Health and Safety legislation in Alberta. If a volunteer feels unsafe completing a task, they are expected to notify their supervisor, the Volunteer Coordinator, or the Health and Safety representative/committee immediately. All tasks will be paused or delayed until tasks are adjusted to increase safety or, if appropriate, until a replacement volunteer is found. Adjusting tasks should be done in conjunction with the Volunteer Coordinator and the Health and Safety representative/committee.
- Additional resources
 - [Are students and volunteers workers?](#) (Government of Alberta, 2022)
 - [Occupational health and safety and the non-profit sector](#) (Government of Alberta, 2022)

Reimbursement

A reimbursement policy should clearly explain whether volunteers are ever expected to make purchases on behalf of the organization, and if so, under what circumstances. It should define which types of expenses are eligible for reimbursement (e.g., supplies, transportation, event-related costs, etc.), and outline any limits, required approvals, or documentation needed, like receipts or preauthorization forms. The policy should also specify who is responsible for processing reimbursement requests, including the staff member or department that reviews submissions, timelines for repayment, and how volunteers will receive their reimbursement. By providing clear guidance, the policy helps prevent misunderstandings, ensures volunteers are not personally burdened by organizational expenses, and supports a transparent, fair financial process.

- Considerations to help you write this policy:
 - How is your reimbursement policy communicated to volunteers? Are the volunteers clear on what can/cannot be reimbursed? Are there limits to vendors and prices that are communicated to volunteers? Are there time limits to when a volunteer should submit for reimbursement?
- Example of policy statement
 - Volunteers must receive permission from their supervisor before making a purchase on behalf of the organization. The volunteer must submit an expense form with a receipt within 2 weeks of the purchase date. The organization will refund the volunteer within 2 weeks of the submission of the expense form.
- Additional resources
 - [Policy Regarding Out-of-Pocket Expenses for Volunteers](#) - Canada Revenue Agency (2009)
 - [Volunteers and Money - Karen Knight Consulting](#) (2025)

Rule-of-Two

Organizations can have a governing body that determines cross-organization policies, such as a Rule-of-Two policy. This policy outlines who should be supervised, by whom, and when. This policy is designed to strengthen safety, accountability, and transparency in both the volunteer's and the organization's work. This policy will typically define which individuals require supervision, and under what circumstances the rule must be followed.

- Considerations to help you write this policy:
 - Are there any possible scenarios where implementing a Rule-of-Two is not possible? Do you have policy and procedures in place for when that happens?
 - What measures are in place to assess compliance?
 - Are there ways for volunteers to report when unsupervised access happens that breaches the Rule-of-Two (ex. Outside of program, other volunteers did not show up/showed up late, first aid emergency, etc.)?
 - Is there a parent organization (the ruling body that may own, or govern a subsidiary organization) or representative organization (i.e., Safe Sport) that you are accountable to? What do they require of your Rule-of-Two policy?
- Example of policy statement
 - Players must always be supervised by two volunteer coaches on the field and in the changerooms. In the event of an emergency and only one volunteer is available to supervise, the volunteer must submit a written report of their shift to their supervisor with all details when they were left unsupervised with players.
- Additional resources
 - [Rule of Two](#) (Coaching Association of Canada, accessed Feb. 2026)

Social Media/Representing the Organization

A social media policy can outline if and how volunteers are permitted to post about your organization online (through the organization’s social media accounts or their own personal accounts), if volunteers are permitted to follow clients, and any other standards volunteers need to be made aware of when representing the organization online. It may also set expectations around maintaining confidentiality, respecting boundaries, and avoiding posts that could harm the organization’s reputation. By providing this guidance, the policy helps volunteers navigate online interactions responsibly and ensures the organization is represented in a safe and professional manner.

- Considerations to help you write this policy:
 - Volunteers who befriend or follow clients and staff with private social media accounts may need guidelines on how to interact with the client base. Since the organization cannot access private accounts and messages, further training or guidelines may need to be implemented to ensure privacy and confidentiality policies are fulfilled. We encourage you to reach out to organizations similar to your own to see what their policies are like and to review ethical standards for any regulating bodies relevant to your programming (i.e., Canadian Association of Social Workers, etc.).

- Expectations for volunteers and clients need to be communicated effectively with all relevant parties. It may be wise to offer reminders throughout the year to ensure the standards for social media representation.
- Examples of policy statement
 - Volunteers must take precautions to ensure and maintain the confidentiality of information transmitted through any electronic technology and inform any clients they work with of any known limitations to privacy as a result of this technology. Volunteers must consider these guidelines when faced with a friend request or other interaction from a client or former client on social media.
 - Volunteers cannot post client information (including non-identifying information) to social media platforms.
- Additional Resources
 - [Social Media Use and Social Work Practice](#) - Canadian Association of Social Workers (2014)
 - [Social Media and e-Professionalism: Guidelines for Nurses - College of Licensed Practical Nurses of Alberta](#) (2021)

Violence, Discrimination and Harassment Prevention

This policy outlines your commitment to providing a safe and welcoming work environment in which all are treated with dignity and respect. This policy should encompass the responsibilities of the organization and the team members involved (including volunteers) to prevent violence and harassment, but also to clearly outline the steps to file a complaint and how it will be investigated. It should also affirm the organization's dedication to taking all concerns seriously and responding promptly and fairly to ensure the ongoing safety and wellbeing of everyone involved.

Violence and harassment are defined in Alberta's [Occupational Health and Safety \(OHS\) Act](#) (2025) (read more on page [20](#)). In this legislation, it outlines that organizations must develop a prevention plan which involves worker involvement training, and regular review.



Note: Volunteers are considered workers under this legislation.

If your organization has any policies that specifically outline human rights requirements for employees or clients, consider how they may impact volunteers as well. Volunteers have the same right not to face discrimination as any employee or client would. This could look like amending existing human rights policies to include volunteers, or creating a policy that specifically outlines the human rights obligations your organization has towards its volunteers.

- Considerations to help you write this policy:
 - When writing this policy, it's important to think about who might be accessing it and when. All team members should read it during orientation, but they may also access it if they have been a victim of violence or harassment. Keeping this in mind, it should be easy for them to find and access it. They should be able to easily read through it and identify how they can file a complaint (make it clear who they can report to and what they need to file a complaint), and what supports will be made available to them.
 - There has been a move for organizations to start including Domestic Violence within their policy as a form of community care. While your organization may not be able to prevent it, it can create a policy and plan to help foster a culture that allows those experiencing violence to access support and ensure their well-being in the spaces you have control over. For more information on how to develop a domestic violence policy, see the additional resources below.
 - This policy can also outline your response to violence and harassment from external sources – not just from staff and volunteers. If your organization regularly deals with the public, this can be a good way to outline how your organization wants to address misconduct from program attendees or the general public.
 - A clear reporting structure for your volunteers is necessary to handle violence and harassment concerns. Make sure all volunteers know who they report to and who they can send complaints to. It could even be a good idea to develop a separate “Whistleblower Policy” to help protect individuals who speak out about organizational misconduct or significant wrongdoing. For an example of what a whistleblower policy could look like, refer to the additional resources part of this section.
- Examples of policy statement
 - Our organization is committed to providing an environment free of violence and harassment, where all individuals are treated with respect and dignity, can contribute fully and have equal opportunities. Harassment and violence will not be tolerated, condoned or ignored. If a report of harassment or violence is proven, disciplinary measures will be applied, up to and including filing reports with appropriate authorities, termination of employment or banning participants from programs/events hosted by the organization.

- Our organization commits to providing a safe and respectful workplace through preventative education and resources, empowering all team members to speak up without reprisal, and responding promptly to incidents of inappropriate behavior. Maintaining a respectful workplace is a collaborative effort, and all team members are expected to adhere to this policy. Volunteers are encouraged to speak to the personnel they are most comfortable with, whether that is their supervisor, Volunteer Coordinator, a board member, or other staff or volunteer.
- Additional resources
 - [Guidelines for balancing safety and confidentiality in situations of workplace domestic violence](#) (The Centre for Research & Education on Violence against Women & Children, Faculty of Education, 2010)
 - [Supportive Workplace Policies, Practices and Programs](#) (New Brunswick DIPV in the Workplace Committee, 2025)
 - [Quick Reference – Compliance Guide](#) (Cultural Human Resources Council, 2019)
 - [Respectful Workplace Policy Example](#) (Law Society of Alberta, 2023)
 - [Sexual Assault Centre of Edmonton](#)
 - [Whistleblowing Policy – KPMG](#) (accessed Jan. 2026)

Virtual Volunteering

A virtual volunteering policy should cover tech usage and safety to protect personal and private information. The policy can outline what roles are permitted to perform tasks online, any usage of programming (i.e., Microsoft Office, a volunteer database, etc.), and any cybersecurity measures your organization takes to protect its community members. It can also clarify expectations for appropriate online conduct and communication to ensure a safe, respectful, and secure virtual environment for everyone involved.

- Considerations to help you write this policy:
 - If a volunteer uses their personal device to access sensitive organizational information, how do you ensure that the information remains secure? Are they required to logout after each use? Do you change the passwords regularly?
 - If there is a breach, what steps are the staff and volunteers required to take? How is that information communicated? Do you need to provide training on these steps?
 - How do you ensure that volunteers using personal devices are accessing secure networks?
- Example of policy statement
 - Volunteers are permitted to use organization devices for data-tracking. They must sign out a device to use and sign it back in. The volunteer is responsible for logging into and out of the device at the beginning and end of their shift. If there is a breach in security, all relevant passwords will be updated, and the Volunteer Coordinator will communicate password changes to volunteers securely. Organization devices are to be used for organization-related work, not for personal use.

- Additional resources
 - [Virtual Volunteer Risk Assessment Matrix](#) (Apr. 2022)
 - [Virtual Volunteer Position Risk Assessment Template](#) (Mar. 2022)

The 10 Steps To Screening

The [10 Steps to Screening from Volunteer Canada](#) provide a general and helpful guideline for organizations to screen their volunteers. Depending on your volunteer screening program, you may have a policy for all or just some of the 10 steps in addition to other volunteer screening policies as seen above.

Risk assessments

A risk assessment policy can outline how your organization identifies, evaluates, and prioritizes risks, why this process is essential for maintaining safety and operational stability, and who is responsible for conducting these assessments. It should describe the methods or tools used to analyze potential risks, along with the frequency of reviews to ensure risks are continually monitored. This policy can also include how your organization intends to respond to unprecedented or emerging risks, such as developing contingency plans, activating a crisis response team, or adjusting procedures as new information becomes available. By clearly defining these processes, the policy helps create a proactive, informed approach to risk management across the organization.

- Considerations to help you write this policy:
 - If a volunteer/community member brings up a concern or there is an incident, how does your organization respond? Are there procedures in place to update policy or procedures to prevent or reduce harm in the future?
 - Risk assessments should be completed regularly. It is more like a mindset to look out for risks/potential for harm but can also have a formal routine. See page 10 for more details.
 - Consider asking your legal representative or your insurance company of any risks that they see.
- Example of policy statement
 - The Volunteer Coordinator is responsible for collecting feedback and surveys throughout the year to inform risk assessments. Any adjustments to roles and policies based on risks identified during the assessment process will be communicated with staff and volunteers.

- Additional resources
 - [Position Description Risk and Policy Considerations Template](#) (Sept. 2018)
 - [Volunteer Risk Assessment Matrix](#) (Apr. 2022)
 - [Risk Assessment Checklist](#) (Mar. 2024)
 - [Risk Assessments and You Webinar](#) (Nov. 2025)

Position Assignment

Every volunteer role should have a job description to ensure clear communication with the volunteer and to protect the volunteer under the Freedom to Care Act. The position assignment policy may be covered under more general screening policies about creating or updating volunteer positions or may be implied in procedures that outline how to assign roles. The position assignment policy, therefore, should focus on responsibility, outlining who is responsible for assigning volunteers and communicating with them.

- Considerations to help you write this policy:
 - What can be done to mitigate bias in the position assignment process? Are there any processes or steps to ensure fair and equitable placement, such as using a matrix or providing a trial period?
 - How does your organization assign volunteers to roles? How do you communicate to the volunteer what position they've been assigned to? How do you accommodate for a volunteer who isn't a good match for the role they are in?
 - If a volunteer tries out a role and decides it's not for them, do your policies and procedures allow flexibility for the volunteer to try a different role?
- Example of policy statement
 - After a volunteer submits a volunteer application and completes an interview, the Volunteer Coordinator will work with other staff and volunteers to determine the best match. If the role is open, the Volunteer Coordinator will email the volunteer with all relevant information regarding the role, along with a Confidentiality and Code of Conduct form.
- Additional resources
 - [Freedom to Care Act: Government of Alberta](#) (June 2021)
 - [Developing Volunteer Positions Webinar](#) (Nov. 2023)
 - [Role Creation & Position Description Development](#) (Volunteer Toronto, 2016)
 - [A Fresh Take on Volunteer Position Descriptions](#) (Tobi Johnson & Associates, 2025)

Volunteer Recruitment

A recruitment policy should state your organization’s commitment to equity, inclusiveness, and fair treatment throughout the volunteer recruitment process. The policy should acknowledge that you welcome volunteers of all backgrounds, identities, and abilities, and that selection decisions are based on skills, interests, and alignment with organizational needs rather than personal characteristics. It can also outline the steps the organization takes to remove barriers to participation—such as offering accommodations, providing accessible communication formats, or ensuring outreach strategies reach diverse communities. By clearly articulating these commitments, the policy reinforces a culture of respect and helps build a volunteer team that reflects the communities you serve.

- Considerations to help you write this policy:
 - How do you minimize biases your recruitment policy?
 - If some restrictions are required (e.g., age limits for certain roles), how can your policy still accept and welcome volunteers who face those restrictions? Is there another role that would be a better match? If not, could you refer them to another organization recruiting volunteers?
 - How does your organization support people with disabilities? For example, do you have access to sign language translators? Does your volunteer program rely primarily on written communication or verbal communication when recruiting volunteers?
 - Does your policy reflect your practice? Do you do things to support volunteer recruitment that aren’t clearly outlined in policy, such as building a culture of kindness, respect, and reciprocity? Does the diversity of your volunteer base reflect your policies? For example, if you have a lot of newcomers volunteering, what policies could you create about translating volunteer documents, such as role descriptions, into other languages?
- Example of policy statement
 - Volunteers from all backgrounds, regardless of age, ability, ethnicity, nationality, religion, gender, and sexuality are welcome to volunteer at our organization. We are committed to creating an inclusive environment where every individual feels valued, respected, and able to contribute meaningfully. Our organization actively strives to remove barriers to participation by providing accommodations when needed, ensuring accessible communication, and fostering a culture that celebrates diversity.
- Additional resources
 - [Volunteer Recruitment and Hiring Webinar](#) (2021)
 - [How Do I Get More Volunteers and Why is That the Wrong Question?](#) (Jan. 2025)
 - [Volunteer Recruitment and Retention: Insights and Stories Panel](#) (Feb. 2025)
 - [Documents - Idealist Inclusive Volunteer Recruitment Guide](#) (Idealist, 2024)

Volunteer Applications

A volunteer application policy should explain why applications are requested, emphasizing that they help the organization understand applicants' interests, skills, availability, and suitability for different volunteer roles. The policy should also identify who is responsible for receiving, reviewing, and tracking applications, whether it's a volunteer coordinator, program manager, or another designated staff member. In addition, it should clarify how application information is stored and protected, including any privacy measures taken to ensure personal data is handled securely and used only for volunteer-related purposes. The policy can also outline how long application records are retained, in accordance with organizational guidelines or legal requirements, and what happens to the information once that retention period ends. By outlining these processes clearly, the policy helps build transparency and trust with prospective volunteers.

- Considerations to help you write this policy:
 - Although an application policy shouldn't necessarily outline the types of questions asked in the form, you should consider why a volunteer application is necessary at all and needs to be outlined in policy. What screening need is addressed through an application? A policy could insist that questions in application forms only gather information that is needed for volunteering, instead of gathering extraneous information that the volunteer may not need to disclose. For example, it may be unnecessary in a general volunteer application to request a driver's abstract when only certain roles are expected to drive or asking for extensive work experience when the role requires little to no previous experience.
 - Do you ask for emergency contacts? An application policy could outline the use of emergency contacts as a method of managing risk for volunteers.
 - If a volunteer cannot complete a volunteer application (language barriers, sight impairment, etc.) does that mean they cannot volunteer with your organization at all? Are there alternative ways to gain the same information you would ask for in a volunteer application? Are there options to fill out the application on a hard copy, online, or in person through a conversation?
- Example of policy statement
 - All volunteers in long-term roles are expected to fill out a volunteer application form before the start of their first shift. Assistance in filling out the form is available from staff upon request.
 - All application forms are locked in a filing cabinet or stored behind a firewall. If a volunteer leaves their volunteer position, the volunteer application will be kept for 1 year from the date of their last shift and then deleted or destroyed.
 - To ensure volunteers are appropriately cared for in the case of an emergency, all volunteers must provide the organization with their emergency contacts' phone numbers via an application form before they start volunteering.

- Additional Resources
 - Examples of various volunteer application forms:
 - [City of Edmonton](#)
 - [Canadian Red Cross](#)
 - [Hockey Alberta Operational Committee](#)
 - [Edmonton Federation of Community Leagues Volunteer Application Form Template](#)

Volunteer Interviews

An interview is a tool you can use to screen volunteers. It is a great opportunity to create a relationship with the prospective volunteer, answer any questions they have, and dream together about the best match for them and your organization. This policy can outline which roles require a volunteer interview, who is responsible for completing the interview, and appropriate interview conduct.

- Considerations to help you write this policy:
 - Do you track information gleaned from an interview? How is that information stored? How long is it held on to?
 - Are there any accessibility considerations you can plan for? For example, what if the volunteer does not speak the same language as you? Are they automatically disqualified from the screening process? Or are there accommodations you can make to give a fair and equitable chance to all volunteers?
 - An interview/conversation is an opportunity to encourage volunteerism rather than adding more barriers. Even if the volunteer is not a great match for your organization, you could point them towards another organization that might be a better match.
- Example of policy statement
 - Volunteers applying for long-term or high-risk roles are expected to complete a volunteer interview online, in-person, or on the phone. All answers will be recorded and kept under the volunteer's file in the volunteer database. All answers will be deleted after 1 year of inactivity from the volunteer. The Volunteer Coordinator is responsible for collaborating with the volunteer to ensure accommodations have been made to support a successful interview for the volunteer candidate (i.e., translations, etc.).
 - The Volunteer Coordinator will send all interview questions to the volunteer 24 hours before the interview if time allows. The interview will determine the best match for the volunteer at the organization and will be notified within 2 business days if they are successful and can continue the screening process.
 - If a volunteer must take time off work to complete their screening interview, the organization must provide an honorarium of \$25 to the volunteer.

- Additional resources
 - [10 Volunteer Interview Questions for a Perfect Match](#) (Tobi Johnson & Associates, 2024)
 - [Getting to Know Volunteers Through Values-Based Questions](#) (Idealist, 2024)

References

Policy about references can outline if your organization will ask a prospective volunteer for references, the types of references, how many you will ask for, and how the information is stored/used. It can also clarify the purpose of collecting references—such as verifying suitability for roles that involve vulnerable populations or handling sensitive information. Providing this context helps volunteers understand how their information will be used and reinforces your organization’s commitment to safety and transparency.

A reference policy can also include if your organization allows you to provide a reference for volunteers. This section can describe who within the organization is authorized to give references and what type of information they are permitted to share. By setting these parameters, the policy ensures consistency and protects both the organization and volunteers from the release of inaccurate or inappropriate information.

- Considerations to help you write this policy:
 - What does your organization gain from asking for references? Is there another way to achieve the same goal through a different screening step that involves interacting directly with the volunteer?
 - What kind of reference is appropriate for the role? Should it be a work-related reference or just a general character reference?
 - Many volunteers consider reference checks to be a barrier to volunteering, and according to Dr. Moyo Mutamba’s 2022 paper, [An Anti-Racist Approach to Volunteering](#), BIPOC individuals express this sentiment more than white individuals. However, some high-risk volunteer roles may still need reference checks to be completed to ensure the volunteer can safely perform the duties they need to. Think carefully about which volunteer roles require reference checks and which do not, based on the level of risk involved in the position.
- Example of policy statement
 - Volunteers who are in high-risk, client-facing roles are expected to provide 1 non-family member reference for the organization to call after the initial volunteer interview if the Volunteer Coordinator deems it appropriate.
 - The Volunteer Coordinator is expected to ask for verbal consent from the reference contact to take notes. The Volunteer Coordinator will follow a pre-determined set of questions.
 - The Volunteer Coordinator is able provide references for volunteers if time and workload allows.

- Additional resources
 - [An Anti-Racist Approach to Volunteering](#) (Mutamba, 2022)
 - [Volunteer Risk Assessment Matrix](#) (Apr. 2022)

Background Checks

A background check policy should outline which volunteer roles require a background check, the type of check needed, how the resulting information is stored, how long the check is considered valid, and whether volunteers will be reimbursed for any associated fees. It can also clarify the rationale behind requiring background checks—such as ensuring the safety of clients, staff, and other volunteers, particularly in roles working with vulnerable populations. Additionally, the policy may describe how results are reviewed, who has access to them, and what steps are taken if a background check raises concerns. By clearly defining these procedures, the policy promotes transparency and helps volunteers understand how their information is protected and used responsibly.

- Considerations to help you write this policy:
 - Why do you or don't you ask a volunteer for a background check? Like reference checks, many volunteers find background checks to be a barrier to volunteering. Ensure you consider which volunteer roles need checks for safety reasons and which lower-risk roles may not (e.g. simple roles with a lot of supervision). Make sure volunteers know why they are being asked to complete a background check.
 - Will your organization reimburse a volunteer for any associated costs to complete the background check or are they expected to pay out of pocket?
 - Where and how long do you store background checks? Background checks are considered property of the volunteer, not the organization, so treat these documents with care, discretion, and privacy.
 - There are different types of background checks that reveal different information. It is important to be aware of the different types of background checks to ensure you are obtaining the relevant information. Below are basic definitions to familiarize yourself with:

Criminal Record: A record of involvement with the Canadian Justice system, including criminal convictions, discharges, and 'no finding of guilt' convictions (ex. Police surveillance mental health apprehension, charges withdrawn, stay of proceedings, etc.)

Criminal Record Check (CRC): The term is used interchangeably with Police Information Check, but is more commonly used by the RCMP. A name and date of birth-based search of the national Canadian Police Information Centre (CPIC) system to verify potential criminal records. It may also include searches of other national and local databases depending on the processes of that detachment.

Police Information Check (PIC): The term is used interchangeably with Criminal Record Check but is more commonly used by local police services in Alberta. It uses the same CPIC system to check criminal records, along with other databases, like a CRC.

Vulnerable Sector Check (VSC): An additional search that can be requested in conjunction with a CRC/PIC to search through the National Record Suspension database to determine if the individual has been issued a record suspension (aka Pardons) for a sexual offence. It may also include an additional search through local police records to determine a pattern of behaviour that would present a safety concern for vulnerable people. Eligibility to request this search is governed by the federal Criminal Records Act, section 6.3(3).

- Example of policy statement
 - Volunteers working as youth mentors and over the age of 18-years-old are expected to obtain a Vulnerable Sector Check before the start of their first shift. The volunteer will be reimbursed by the organization within 2 weeks of submitting the receipt.
 - Physical background checks will be locked in a filing cabinet and electronic copies will be stored behind a firewall. Physical and electronic copies will be destroyed or deleted after 3 years.
- Additional resources
 - [Navigating Background Checks](#) (Dec. 2024)
 - [Rethinking Vulnerable Sector Checks: An Intersectional Approach to Equity Interactive Tipsheet](#) (Gueverra, 2025)
 - [Criminal Records Act](#) (Government of Canada, accessed Jan. 2026)
 - [Alberta Police Information Check Discloser Procedures](#) (Alberta Association of Chiefs of Police, 2019)

Orientation and Training

Providing volunteers with clear direction through orientation and training is critical to successful volunteer programming, and having policy that helps codify standards and create consistency can be extremely helpful for ensuring long-term success. An orientation and training policy should outline what roles are required to take certain types of training and who is responsible for training or orientation.

- Considerations to help you write this policy:
 - How can you use orientation and training to continue welcoming volunteers into your organization? What could you do that would foster a welcoming environment that can be outlined in policy? For example, you could provide handouts in multiple languages to help volunteers from different backgrounds feel included. Try to use your policy to set standards rather than outlining orientation procedures.

- Is there supplemental training you can provide to encourage learning and engagement? How does your organization handle professional development for volunteers? Do you cover the costs of related training for volunteers?
- Examples of policy statement
 - All volunteers in client-facing roles are required to complete the online orientation before the start of their first shift. If a volunteer faces technical difficulties, they can contact the Volunteer Coordinator to schedule an in-person orientation.
 - At the start of the volunteer's first shift, their supervisor will provide relevant training and provide support throughout their role.
 - The organization will contribute up to 50% of all costs related to external professional development training for long-term volunteers, provided the training is preapproved by the Volunteer Coordinator and relevant to the volunteer role they perform.
- Additional resources
 - [Checklist for Training Volunteers Around Equity & Inclusion](#) (Idealist, 2024)

Support and Supervision

Support and supervision are another critical component of effective volunteer programming. The volunteer screening process is extensive, as it's about relationship development and safety. Support and supervision are considered steps in the screening process because they extend the relationship-building process and provide ongoing checks to ensure the volunteer is safe in their role. A support and supervision policy can outline anything from who the volunteers are expected to supervise, who is expected to supervise the volunteers, and if there is any communication expected between the volunteer and their supervisor/who the volunteer is supervising.

- Considerations to help you write this policy:
 - Are there any expectations from your insurance company, a governing body, or professional standards that should inform your support and supervision policy? Appropriate supervision is a risk management practice that many external bodies will look for when assessing the risk of volunteer programming.
 - By outlining supervision expectations, could you increase safety for the volunteers, staff, and clients? For example, see Rule-of-Two policy on page 21.
 - Supervision is complicated. What does your organization do when your volunteers' supervisor needs to temporarily leave their shift for washroom breaks, lunch, or similar reasons? How does your organization account for distractions for the supervisor, such as client requests?
- Examples of policy statement
 - Clients under the age of 16 are expected to be supervised by a volunteer at all times while in the gym. If the supervisor needs to leave their post for any period, they are responsible for finding an appropriate adult to cover for them while they are gone.

- Volunteers in off-site, unsupervised roles are expected to check with their supervisor via phone or video call once a week.
- Additional Resources
 - [The Essential Guide to Managing Volunteers at Your Nonprofit, Chapter 5: Volunteer Supervision](#) (Volunteer Pro, accessed Feb. 2026)

Follow-up and Feedback

A follow-up and feedback policy can outline lines of communication for volunteers to know who to contact and what they can or should share. It's important for organizations to consider feedback from volunteers to improve volunteer screening and programming, including complaints. A follow-up and feedback policy can also outline how often supervisors are expected to check-in with volunteers, and who volunteers can contact in case of emergencies or safety concerns.

- Considerations to help you write this policy:
 - What do you do with feedback? Who has access to any information stored from feedback forms, surveys, focus groups, etc?
 - How are your feedback tools used to improve volunteer programming? Volunteer screening extends into this work because volunteers are human beings who change and grow, so your programming may need to adapt to the emerging needs of the volunteers. For example, a volunteer might point out that part of the environment they're working in is unsafe. How can you know and respond to them through feedback mechanisms?
- Examples of policy statement
 - Our organization is committed to ensuring that volunteers have clear access to the support and information they need to thrive in their roles. Volunteers will be provided with appropriate contact information for the Volunteer Coordinator, their supervisor, and any other relevant personnel as part of their onboarding. The Volunteer Coordinator is responsible for maintaining regular communication with volunteers to support their engagement, address concerns, and foster a positive volunteer experience. Supervisors are accountable for responding to all task-related questions and providing ongoing role-specific guidance.
 - All responses to volunteer surveys or feedback forms will be anonymous and only available to the Volunteer Coordinator and Executive Director.
- Additional resources
 - [How to Give Clear Volunteer Feedback](#) (Tobi Johnson & Associates, 2025)
 - [Receiving Volunteer Feedback](#) (Volunteering Tasmania, 2023)

Closing Thoughts

Congratulations on your volunteer screening policies journey! Whether you are just starting or an experienced policy creator, it takes just one step at a time. This work is hard, interesting, exciting, and deeply appreciated by the team at Volunteer Alberta. Thank you for your commitment to creating safe and rewarding experiences for volunteers.

Happy volunteer screening!



About Volunteer Alberta

Volunteer Alberta is a diverse and inclusive member association that aims to nurture conditions for civic engagement and volunteerism in Alberta. We work with nonprofits across the province as a capacity-building and capability-nourishing organization.

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