



**VOLUNTEER  
ALBERTA**



# THE 10 STEPS TO SCREENING

How to engage and support volunteers in meaningful and responsible ways

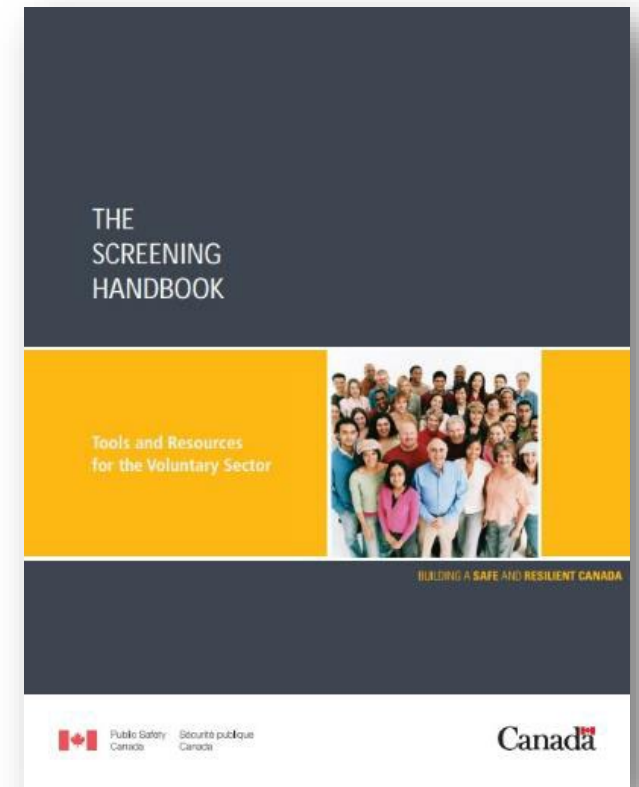
# ACKNOWLEDGEMENTS

This presentation has been adapted from Volunteer Canada's *Screening Handbook*.



Disclaimer: this is a high-level overview of an existing resource and has been adapted for the context of the Volunteer Screening Program.

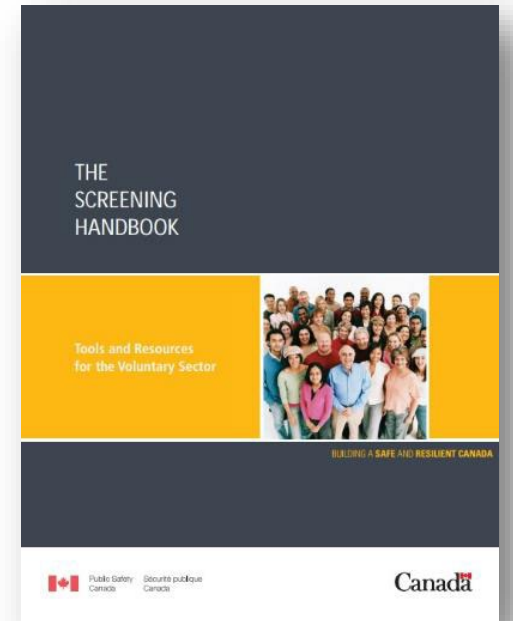
For the full resource, please download the *Screening Handbook* from Volunteer Canada.



# OBJECTIVES

By following the 10 Steps to Screening you will:

- Fulfill duty of care
- Demonstrate commitment
- Understand the value and impact of volunteer involvement





# THE 10 STEPS TO SCREENING



## Pre-Hiring Process

1. Determine Policies & Risks
2. Write Clear Volunteer Position Descriptions
3. Establish a Recruitment Process

## Hiring Process

4. Use Application Forms
5. Conduct Interviews
6. Reference Follow-up
7. Request the Appropriate PIC/VSC (*when necessary*)

## Managing Volunteers

8. Conduct Training & Orientation
9. Supervise & Evaluate
10. Follow-up & Feedback

# Prehiring Process

- Groundwork stage
- Who is responsible?

# Step 1

## 1. Determine Policies & Risks

Set standard policies.

Identify potential risks to participants & organization.



# Step 2



## 2. Write Clear Position Descriptions

Clarify roles & responsibilities.

Set guidelines & behavioural standards for volunteers.



**Volunteer Alberta Template:**  
Volunteer Position Description

# Step 3

## 3. Establish a Recruitment Process

Commit to a recruitment process.

Inform potential volunteers of screening process up front.

May vary depending on volunteer positions.



# Hiring Process

- Implement the recruitment process
- Onboard volunteers
- Involve volunteer managers

# Step 4

## 4. Use Application Forms

Only collect information that is necessary to conduct an interview for the volunteer position.

Indicate the screening process required for the position.

Ask for references and permission to contact them.



**Template/Tool:**  
Window of Work

# Step 5

## 5. Conduct Interviews

Communicate mission, values, & expectations of organization.

Assess the suitability of the candidate for the position.

Ask about past employment & volunteer positions.

Use open-ended questions.



# Step 6

## 6. Reference Follow-up

Check references in accordance with requirements of the position.

Always check more than one reference.

Explain the position & any potential vulnerability of clients/participants.

Ask for open comments.



# Types of Checks



Police Information  
Check (PIC)

**versus**

Vulnerable Sector  
Check (VSC)



# Police Information Checks

- Provide information from a snapshot in time
- Are not volunteer screening

## Questions to consider:

- Is it necessary?
- How is it stored?
- What do you do with it when it's no longer needed?



**Volunteer Alberta Guide:**  
*Volunteer Screening: Is a Police  
Information Check the only way?*

# What is a PIC?

## Includes:

- Existing criminal convictions
- Upcoming criminal court appearances
- A scan of the local police records



# Reasonable Uses

- Volunteer works in a position of trust, but is ***not solely*** responsible for the well-being of vulnerable persons
- Has access to money/financial information



**There may be other risk considerations which would make it necessary to request a PIC.**

# Vulnerable Sector Checks

Performed on request as part of a  
Police Information Check

## Includes:

- Notices if applicant is a pardoned sex offender
- A scan of local and national police databases

# Reasonable Uses

- Volunteer is **solely** responsible for the well-being of vulnerable person(s)
- Volunteer has unsupervised access to vulnerable persons

*Merely being in contact with a vulnerable person **does not** automatically warrant a Vulnerable Sector Check; there must be a significant degree of trust or authority.*



# Both Checks



Police Information  
Check (PIC)

**versus**

Vulnerable Sector  
Check (VSC)



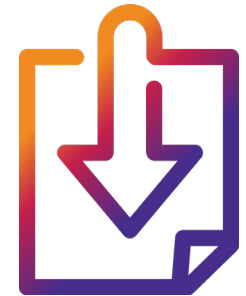
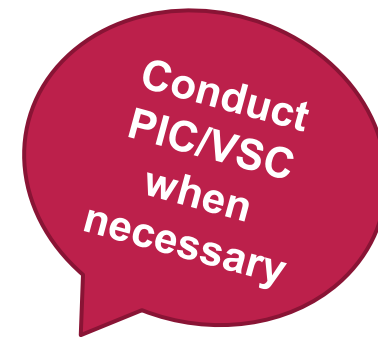
# Step 7

## 7. Request the Appropriate PIC/VSC

If you have determined a background check is necessary, be clear about which type you require - Police Information Check / Vulnerable Sector Check

Include the volunteer position description during the process with police services

Assess the results of the check against organization policies and the requirements & responsibilities of the position



**Volunteer Alberta Guide:**  
*Volunteer Screening: Is a Police Information Check the only way?*

# Managing Volunteers

- Final stage of the 10 Steps.
- Ensure your volunteer is the right fit for the role.

# Step 8

## 8. Conduct Training & Orientation

Ensure candidates are aware of organizational mission, structures, & policies

Assess approach, work style, & skills

Engage existing volunteers in this process too



# Step 9

## 9. Supervise & Evaluate

Using the position description as a reference point, evaluate volunteers *(1-3 times per year)*

Clarify expectations & identify any challenges



# Step 10

## 10. Follow-up & Feedback

Follow-up with volunteers about their experience (*Any advice or observations? What keeps them coming back?*)

Seek feedback about the service provided by volunteers

Ensure volunteers are aware that follow-ups will be conducted

**BONUS:**  
Step 10 is incredibly helpful in supporting volunteer recruitment!

# Implementation Tips

Adaptable Approaches

- Volunteer Screening practices are unique to every organization and program.
- Scale the 10 Steps to align best with your organization.

# Organizational Considerations

- The capacity of staff, organization, and/or programs.
- The budget & funding available.



# Position Considerations

- Adapt screening process for different volunteer positions.
  - Low risk? High risk?
  - Short term? Long term?
  - Training required?



# Procedural Considerations

- PIC/VSC required?
- Formal vs. informal interviews
- Simple vs. complex application forms
- Training & evaluation



# Applicant Considerations

- Level of familiarity
- Qualifications/Characteristics
- Referral from other organization(s)



# Statistics

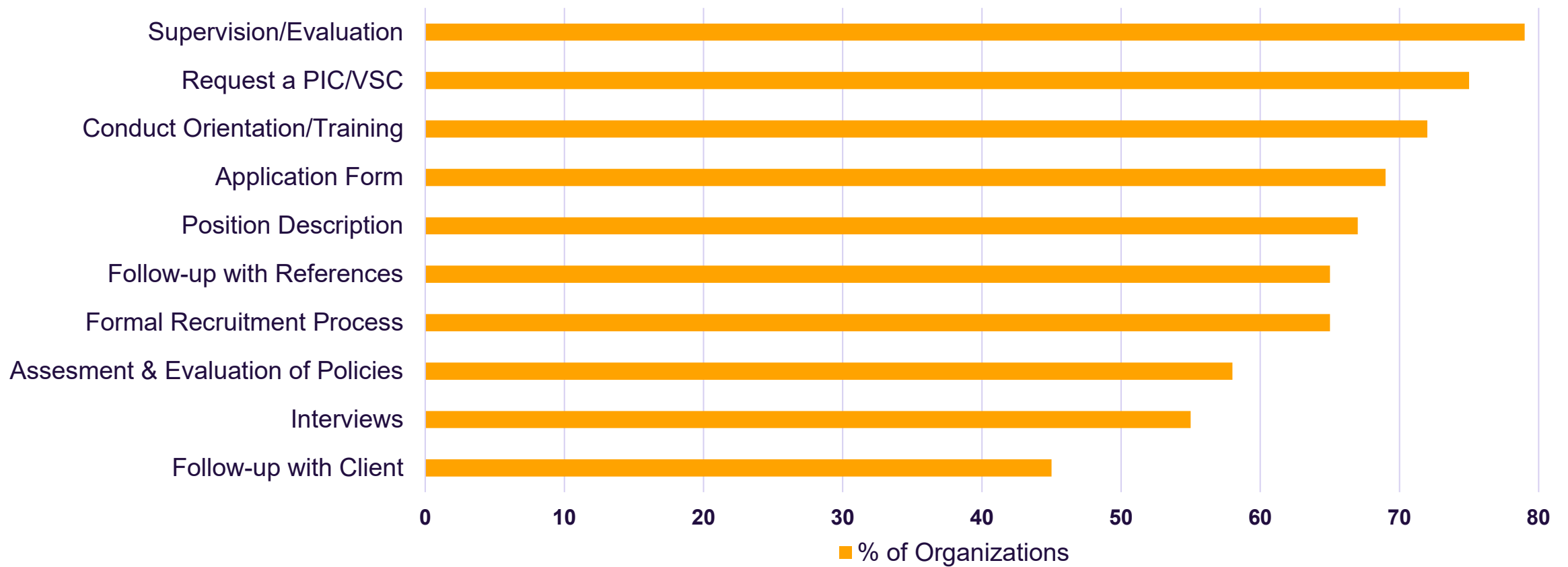
- 64% of respondents said they do not use the 10 Steps.
- However, they just hadn't identified their activities as part of the process!

# Congratulations!

You're doing a  
great job!



# The Uses

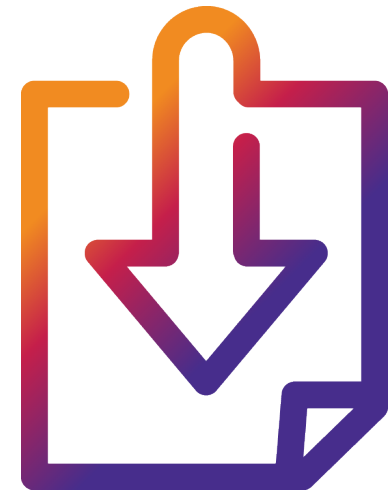


# More Information

- Tools and Resources
- Screening Practices
- Fit
- Length to Keep  
PICs/VSCs on File
- Legal Advice

# Tools and Resources

- Webinar
- Resources
  - Window of Work
  - Position Description Template
- Engaging volunteers is for everyone in your organization!



# Tools and Resources Cont.

- Volunteer Screening Handbook
- Volunteer Screening Development Grant
- Consultation



# Not the Right Fit?

- Maintain commitment to high quality services and programs
- Be honest
- Give positive feedback
- Provide recommendations



# How Long to Keep PICs on File?

- Any information shared in this presentation should not be considered legal advice
- Know which legislation governs your organization
- Look at the Screening Handbook and the Canadian Code for Volunteer Involvement





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**Thank you!**

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