



**VOLUNTEER
ALBERTA**



Screening Volunteers In. Not Out.

Effective screening practices are the key to great volunteers!

Presenter

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What is Screening?



An ongoing process to engage those who are best suited to fill volunteer positions in your organization

**Board Members
& Leadership**

Volunteer Engagement - Everyone is involved

**Volunteer
Managers**



**Volunteers are
essential!**

Volunteers

Board Members & Leadership



Key Focus Areas:

- Policies
- Governance
- Risk & Liability
- Due Diligence
- Duty of Care

Volunteer Managers



Key Focus Areas:

- Recruitment
- Retention
- Positions & Roles
- Responsibilities
- *Duty of Care*

Volunteers



Key Focus Areas:

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- Giving & Sharing
- Passion & Care
- Belonging & Inclusion
- Community
- *Duty of Care*

3 Keys to Screening

Key # 1

- Responsible Volunteer Engagement

Key #2

- Volunteer Canada's 10 Steps to Screening

Key #3

- Creating Volunteer Positions



Screening Volunteers In. Not Out.



Key #1

Responsible Volunteer Engagement



Volunteer screening, there are no standard answers...

There is currently no social policy or legislation for volunteer screening in Alberta.

RCMP and Police Service disclosure guidelines may vary across jurisdictions.

**Stakeholder
Expectations**

**Screening = a multi-
step process**

**Police Information
Checks ≠ Screening**

Important Definitions

Duty of Care

A legal principle (*can be embedded in legislation - explicitly & implicitly*) and fundamental premise underlying volunteer screening



Standard of Care

The degree or level of service, attention, care & protection that one owes another according to the law (*typically the law of negligence*)

Required standards vary according to circumstances & situations



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Volunteer Canada, Screening Handbook, 2012.

Board members:
Duty of Loyalty!

Important Definitions

Vulnerable Person

The federal *Criminal Records Act* definition:

A person who, because of his or her **age** (*under the age of 18 or over the age of 65*), a **disability**, or **other circumstances**, whether **temporary or permanent**:

- a) is in a position of dependency on others
- b) is otherwise at a greater risk than the general population of being harmed by a person in a position of trust or authority towards them



Important Definitions

Positions of Trust/Authority

The federal *Criminal Records Act* definition:

When someone has:

- Decision-making power
- Unsupervised access
- Inherent closeness in the relationship

When someone:

- Conducts personal tasks
- Takes full responsibility for well-being





Alignment is key!
 Risk and policy in
 positions informs
 volunteer screening
 processes



VOLUNTEER SCREENING PROGRAM RISK ASSESSMENT MATRIX

The decision to use a PIC or a VSC is part of the screening process and is determined by the level of risk associated with a volunteer position. Generally, the higher the risk, the greater degree of screening is necessary for the position. Using the Risk Assessment Matrix below, you can determine the level of risk for volunteers and the level of screening required for your volunteer positions.

	MINIMAL RISK	LOW RISK	MEDIUM RISK ¹	HIGH RISK
PARTICIPANTS / CLIENTS	Volunteer is in a role that does not involve a lot of interaction with participants.	Interaction is minimal and supervised by a paid employee. Interaction is with all types of participants.	Interaction is frequent and may be supervised by an employee or senior volunteer on an infrequent basis. One-on-one access may occur in certain situations	Interaction is frequent and volunteer is in a position of trust or authority with a vulnerable person. Volunteer has unsupervised access to vulnerable populations.
SETTINGS	Volunteer works in isolation with no interaction with participants.	Public, non-intimate setting, and/or open space with high visibility and supervision.	Space with limited visibility and infrequent supervision.	Space with no visibility or supervision.
SUPERVISION/ACCESS	Supervision is present at all times.	Supervisor is regularly present.	Infrequent supervision by paid employee or senior volunteer or parent.	Little to no supervision.
NATURE OF THE RELATIONSHIP	No contact/minimal contact with participants. (e.g. administrative support, social media volunteer, gift shop attendant).	Casual, non-intimate relationships that occur in brief interactions and/or over short periods of time (e.g. classroom volunteer, special event volunteer).	Personal relationship that develops, grows, and extends over time. Intimacy and trust may be developed. (e.g. driver, camp counselor, intake worker).	One-on-one relationship, position of trust and authority. Personal relationship is developed between the volunteer and the participant. (e.g. coach, respite caregiver, a mentor).
DEGREE OF PHYSICAL CONTACT	No physical contact with participants.	Infrequent and/or supervised physical contact with vulnerable populations.	High degree of physical contact between the volunteer and vulnerable clients - a close relationship may be developed, but the volunteer does not necessarily have access to client at all times or does not have decision making power.	High degree of physical contact between the volunteer and the vulnerable clients - client and volunteer role is dependent upon the development of a close, personal relationship.

The PIC Process

Before getting a PIC, consider:

- Terms to describe types/levels of police checks
- Information included & disclosed on police checks
- To whom information is released
(*volunteer/organization*)
- Different approaches to processing requests
(*including costs & timelines*)



The PIC Process

Police Information Check

Canadian Police
Information Centre
(CPIC)

Police
Information Portal
(PIP)

Justice Online
Information Network
(JOIN)

Local police records



Vulnerable Sector Check

A VSC includes all the information you'd normally receive in a PIC

All of the above

A query to confirm the applicant has not received a record suspension for sexual offences

Police Information Checks

Reasonable uses

- When a volunteer works with or comes in contact with vulnerable persons, but is not solely responsible for their well-being or in a position of trust and authority
- Has access to money, financial, or otherwise sensitive information
- Has access to or operates vehicles or expensive equipment

There may be other risk considerations which would make it necessary to request a PIC. Volunteer Alberta does not provide legal advice.

Vulnerable Sector Checks

*Performed as *part of a* Police Information Check, when requested.

Reasonable uses

- A volunteer is in a position of trust or authority with vulnerable persons and is solely responsible for their well-being, like a coach or mentor.
- Has unsupervised access to a vulnerable person, like a meals on wheels delivery driver

There may be other risk considerations which would make it necessary to request a VSC. Volunteer Alberta does not provide legal advice.

It's A Fine Balance



**Social norms
& cultural
awareness**

**3:1 drop-off rate
when PIC/VSC
required**

**Court mandated
volunteers/
rehabilitation**

**See opportunities
- not just barriers**

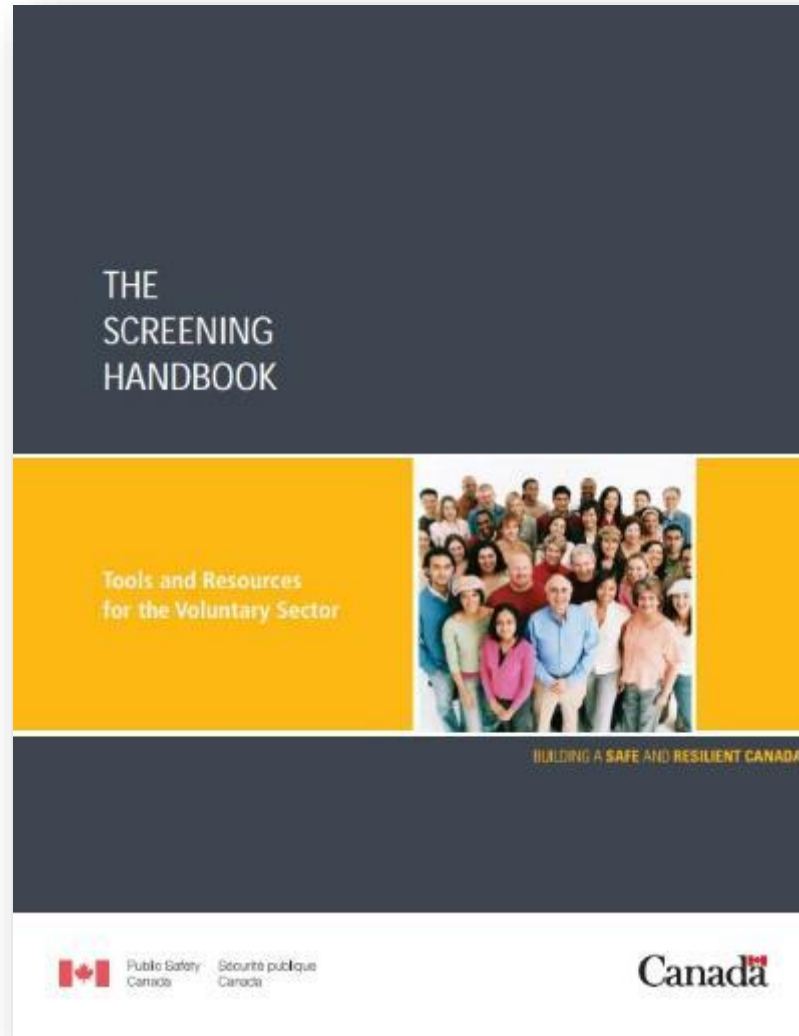
Screening Volunteers In. Not Out.



Key #2

**Follow the 10 Steps
to Screening**





**Developed by:
Volunteer Canada and
Public Safety Canada**



www.volunteer.ca/screening

The 10 Steps to Screening

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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



1. Determine Policies & Risks

Set policies

Identify potential risks

2. Write Clear Position Descriptions

Provide clarity

Set guidelines & standards

3. Establish a Recruitment Process

Commit to a recruitment process

Inform potential volunteers



Volunteer Alberta Template:
Volunteer Position Description





Alignment is key!
Skills & requirements
Responsibilities to risks
Positions with policies

VOLUNTEER ALBERTA

**VOLUNTEER POSITION DESCRIPTION:
RISK ASSESSMENT & POLICY CONSIDERATION**

This template supports volunteer position descriptions to include risk assessments and policy considerations. Positions have responsibilities that require unique set of skills and each position has different risks associated with the position. These risks may require the development and/or refinement of your organizational policies.

POSITION TITLE: _____

POSITION DETAILS	RISKS	POLICY
PURPOSE OF POSITION		
DUTIES / ACTIVITIES		
CLIENT / PEOPLE SERVED		
LOCATION		
TIME COMMITMENT		
SUPERVISION		
OTHER DETAILS		

4. Use Application Forms

Collect necessary information

Ask for references and permission to contact them

5. Conduct Interviews

Communicate values & expectations

Assess suitability

6. Reference Follow-up

Create a holistic picture

Get different perspectives

Assess suitability

Template/Tool:
Window of Work



7. Request the Appropriate PIC/VSC

Account for organizational risks

Assess the results

Comply with organizational standards and policies

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



8. Conduct Training & Orientation

Engage volunteers

Create organizational awareness

Onboard and prepare



9. Supervise & Evaluate

Clarify expectations

Identify challenges

10. Follow-up & Feedback

Seek feedback

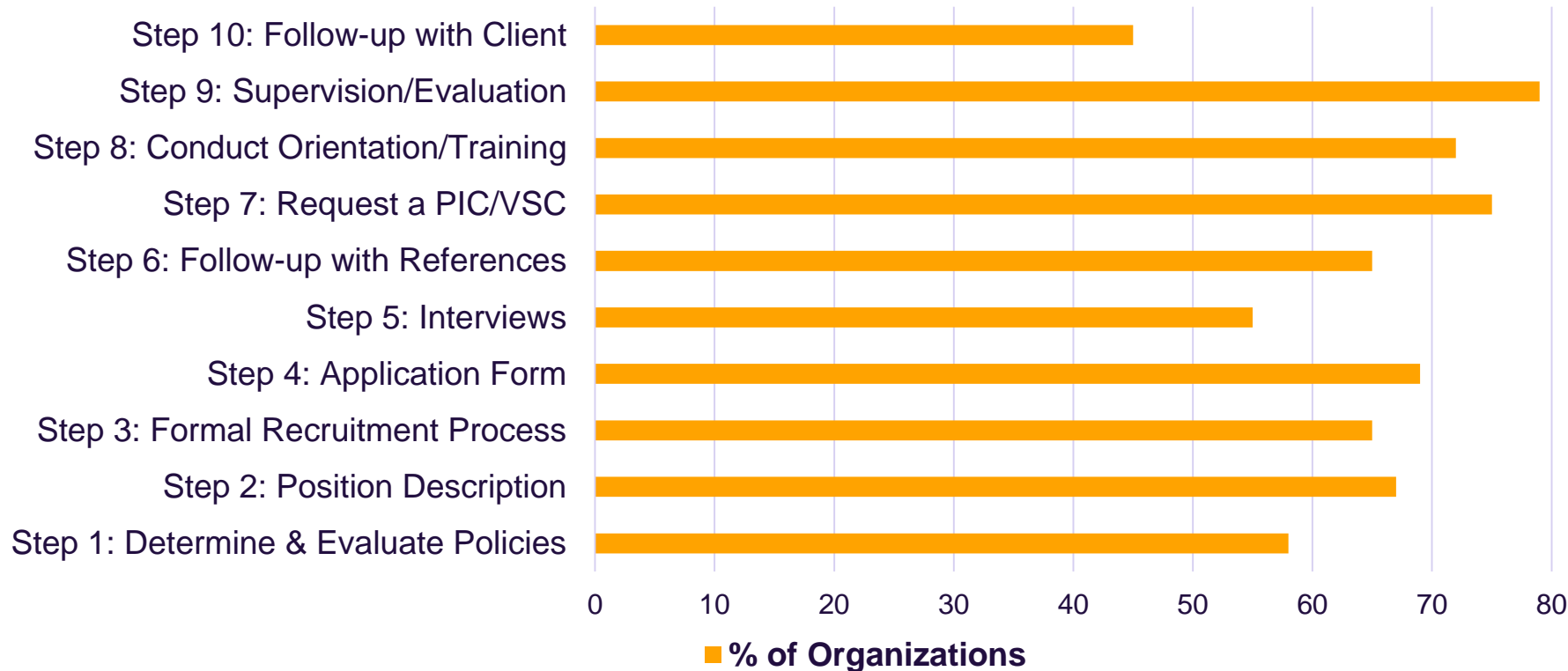
Follow-up with everyone!

Be constructive



Are you using the 10 Steps to Screening?

64% of respondents said they do not use the 10 Steps...but...



...they hadn't identified their activities as part of the process!

Data gathered from Volunteer Alberta surveys, focus groups, and conversations with nonprofits in Alberta. Approximately, 800 organizations responses are represented in this graph

Implementation Tips:

Adaptable Approaches

Volunteer Screening practices are unique to every organization and program.

**Organizational
Considerations**

**Applicant
Considerations**

**Position
Considerations**

**Procedural
Considerations**

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Key #3

Creating Winning Volunteer Positions



Create Meaning & Mutual Benefit

Meaning

Understand WHY

Connect tasks to the mission/vision

Be creative & innovative

Recruiting & retaining great volunteers requires investment – and it isn't easy!

Finding the best match is important!

Mutual Benefit

"What's in it for me?"

Relationships & belonging

Have an open mind

Tool/Template:
Window of Work



Position Descriptions: Important Information to Include

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Volunteer Position Descriptions are an important recruitment tool!

Mission, Vision & Values

Clarify purpose & focus

Raise awareness & outreach

Create alignment

Benefits & Opportunities

Motivations & inspirations
“What’s in it for me?”

Identify what a position can provide

Screening Process & Policies

Provide opportunities to self-select

Reduce barriers

Develop trust in organization

Consider the Possibilities

Static Positions

Necessary

Structured

Set commitments

Volunteer Canada Research:
Bridging the Gap

Dynamic Positions

Reactive

Fast-paced

Flexible

Ideas from Everyone

Volunteer engagement can be impacted significantly by the people involved in an organization.

Consider developing opportunities for feedback that can help improve strategies, approaches & volunteer screening practices.



Board & Leadership

Volunteers
(Board Members)

**Clients/
Participants**

Screening Volunteers In. Not Out.

Final Thoughts

- Think big picture
- Engage everyone
- It's a balance





Volunteer Screening Program

- Education
- Vulnerable Sector Check
Fee Waiver
- Screening Development
Grants

Funded by:

Ministry of Culture, Multiculturalism
and Status of Women



For more resources,
please visit:

1. [Volunteer Alberta](https://volunteeralberta.ab.ca/volunteer-screening-program/)
<https://volunteeralberta.ab.ca/volunteer-screening-program/>
2. [Volunteer Canada](http://www.volunteer.ca) -
www.volunteer.ca

Volunteer Alberta Resources

1. Policy Workbook
2. Risk Assessment Matrix
3. Volunteer Screening: Is a Police Information Check the Only Way?
4. Important Terms & Definitions
5. Position Description Template
6. Window of Work
7. Screening Worksheet Template



Volunteer Canada Resources

1. The Screening Handbook
2. Bridging the Gap



Thank you!

Discover more:

www.volunteeralberta.ab.ca