



WEBINAR

Developing Policy & Managing Risk

2023 Volunteer Screening Program



co-operators[®]



Land Affirmation

Volunteer Alberta's main office is situated on Treaty 6 Territory, specifically, amiskwaciwâskahikan (ᐱᓄᓂᓕᓴᓂᓄᓐᓂᓄᓐᓂᓄᓐ) as it is referred to by the Plains Cree peoples among other Indigenous names, and the homeland of the Métis Nation. Our staff, board, and our work reach across Treaties 4, 6, 7, 8, and 10, and we affirm that the land we call Alberta is the traditional and ancestral territory, as well as present-day homes of many Nations, including the Blackfoot Confederacy – Kainai, Piikani, and Siksika – the Cree, Dene, Saulteaux, Nakota Sioux, Stoney Nakoda, the Tsuu T'ina Nation, and the Métis People of Alberta, which includes the Métis Settlements and the Six Regions of the Métis Nation of Alberta. Since time immemorial, First Nations, Inuit, and Métis peoples have cared for these lands, and they continue to do so today. Volunteer Alberta identifies and affirms the historical and current relationships of these Nations to the land as an act of Reconciliation and with the awareness that acknowledging, recognizing, or affirming these facts is a small step and not enough.

Volunteer Alberta is committed to reflecting on, critiquing, and changing our ways of knowing, being, and doing in order to start supporting and concretely contributing to Reconciliation and Indigenous Resurgence in ways we have not yet done.

What is VSP?

- Partnership between Volunteer Alberta and Government of Alberta
- Provides educational resources and tools designed to help nonprofit voluntary sector (NPVS) organizations improve their volunteer screening processes and procedures
- Offers financial opportunities to aid organizations in their volunteer screening efforts, including the Vulnerable Sector Check Fee Waiver and Volunteer Screening Development Grants



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Volunteer Alberta does not provide legal advice.

- This webinar and our resources will provide some useful, general information, but you should bring any concerns specific to your organization and work to a legal professional.



Intro to Policy: Key Elements

○ No consistent definition

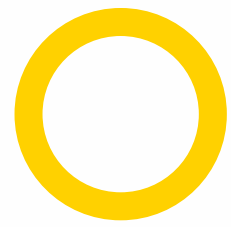
○ Applies to everyone

○ States a boundary (what is and isn't okay)

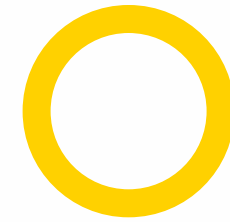
○ Provides guidelines for decision-making

○ Often viewed as separate from procedures

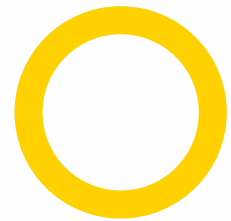
Intro to Policy: What does a good policy look like?



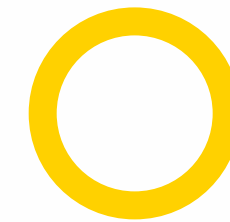
Considers the people most affected by the policy



Relevant and needed



Well-researched



Is updated on a schedule

Intro to Policy

Legislation

What needs to be done by *every* organization

Bylaws

What needs to be done by *your* organization

Policy

What you have decided to do

Procedures

How you have decided to do it

Intro to Policy

Policy

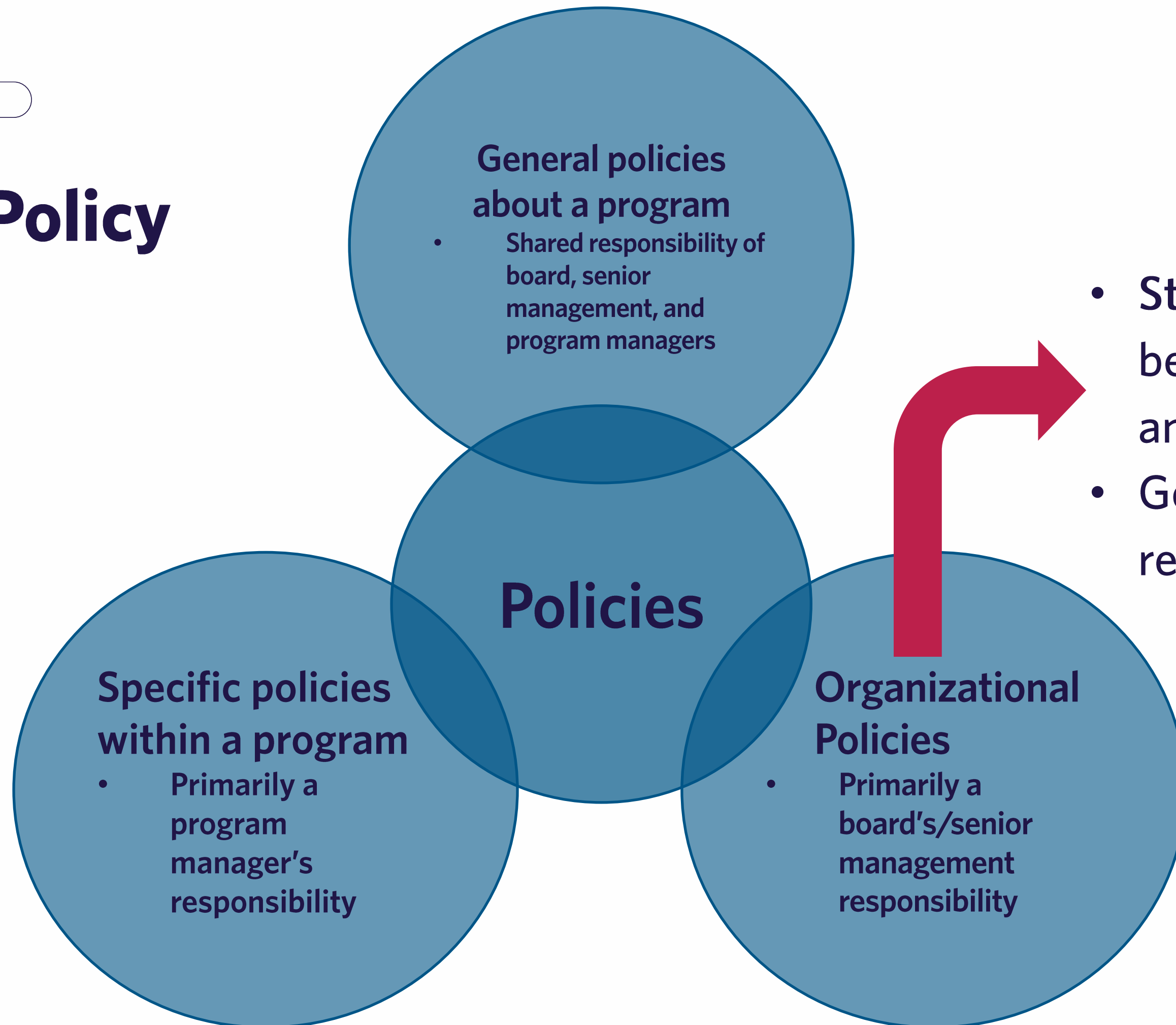


- **Statement of belief, position, and/or value**
- **Method of risk management**
- **Rules**
- **Aid to program effectiveness**

Intro to Policy

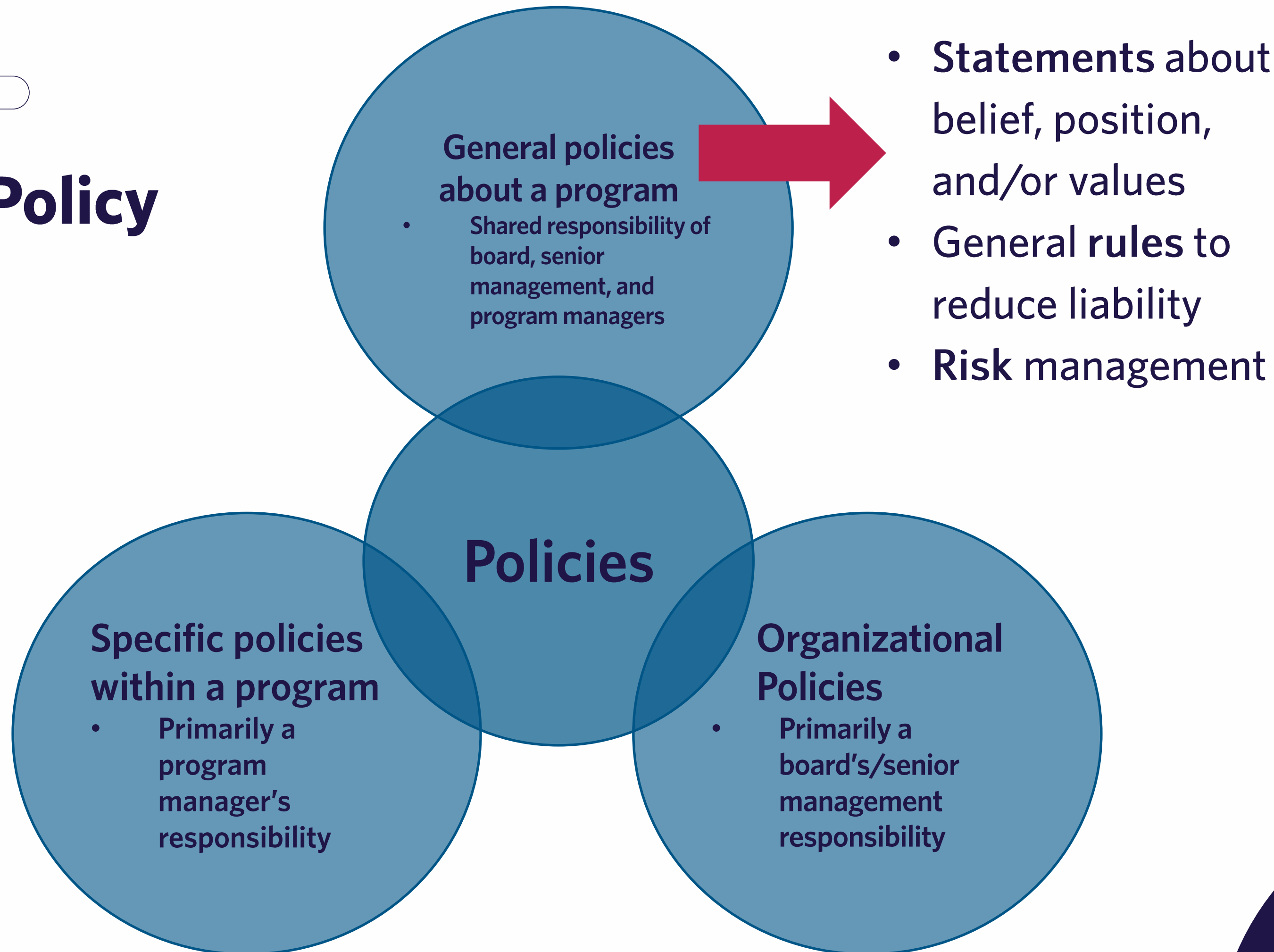


Intro to Policy



- Statements about belief, position, and/or values
- General rules to reduce liability

Intro to Policy



Intro to Policy

- Statements about belief, position, and/or values
- Risk management
- Starts touching on procedure



Examples

Organizational Policies

- ❑ Our organization believes in the fair and equitable treatment of all our clients and stakeholders.
- ❑ As an organization that provides programs and services for vulnerable populations, we commit to protect the confidentiality and privacy of all our members, program participants, employees and volunteers.

General Policies About a Program

- ❑ Screening volunteers is an essential component of effective risk management and is the responsibility of everyone within our organization.
- ❑ All ongoing volunteers will take part in yearly evaluation by the volunteer manager to help identify possible areas of growth and development for the volunteer and the organization

Specific Policies About a Program

- ❑ All volunteers working with vulnerable populations are required to undergo training conducted by the facilities manager before beginning their volunteer work.
- ❑ Volunteers are required to submit a log of their work at the end of every volunteer shift or, for volunteers who work irregular hours, at the end of every month.

Risk Management & Policy

The relationship between policy and risk:

- Planning for potential hazards
- Due diligence and duty of care
- Standard of Care

Duty of care is an organization's obligation to take reasonable measures to care for and protect staff, clients, participants, volunteers, and the organization to an appropriate standard.

The appropriate standard of care is dependent on the situation and risks.

Risk Management and Policy: Insurance Policies

- Find a commercial insurance plan and a representative that understands the non-profit sector
- Keep your insurance representative in the loop
- Volunteer screening processes have insurance policy implications

Example:

Administrative Volunteer

PURPOSE OF POSITION

The Administrative Volunteer role exists to support administrative staff by checking in students for classes and the overall operations of the front office.

DUTIES / ACTIVITIES

Shredding files, answering the phone, managing client files as needed, welcoming guests and participants.

CLIENT / PEOPLE SERVED

Children accessing the organization's art classes.

LOCATION / SETTING

The office and classroom are in an office building with windowed walls facing the public hall. Each classroom has windowed doors facing the office.

TIME COMMITMENT

3-8 hours/week

SUPERVISION / TRAINING / ORIENTATION

Works with, but not directly supervised by, administrative staff, general orientation provided by the Volunteer Manager and role training by administrative staff.

OTHER DETAILS

Interacts with participants as they enter the main office, given password access to CRM database to update attendance and knows code for client files to update information when asked.

Assessing Risk: Risk Assessment Matrix

	Minimal risk	Low Risk	Medium Risk ¹	High Risk
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Assessing Risk – Possible Policies

- The Administrative Volunteer must be supervised at all times by other volunteers or paid staff members and cannot place themselves in private, one-on-one settings with clients.
- The Administrative Volunteer is required to complete FOIP (Freedom of Information and Privacy) certification and sign a confidentiality agreement before starting the volunteer position.
- Administrative Volunteers are required to participate in an onsite orientation conducted by administrative staff, focusing properly handling of office supplies, equipment, and online systems.
- All onsite staff and volunteers are required to complete First Aid training before the start of their first shift. The organization will cover course costs.

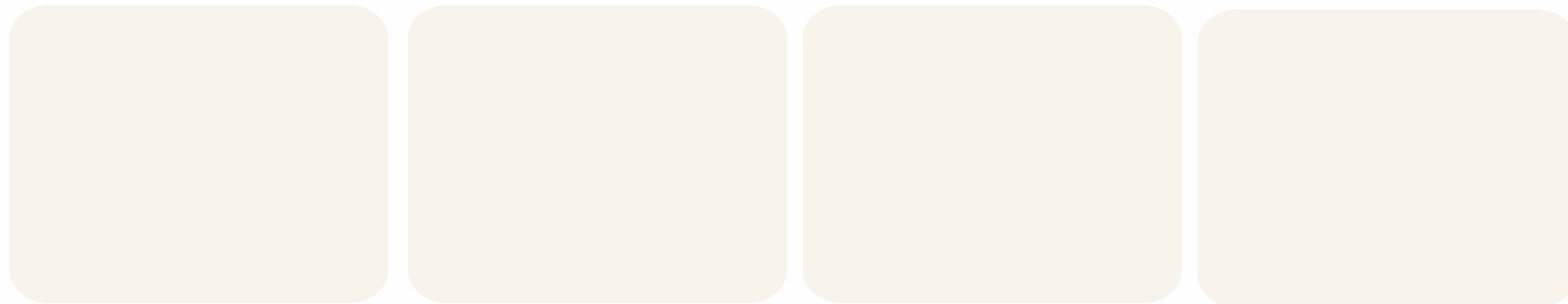
Possible Policy Areas to Help Mitigate Risk

**Right to
Volunteer**

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**Right to
Volunteer**

**Different
kinds of
volunteers**

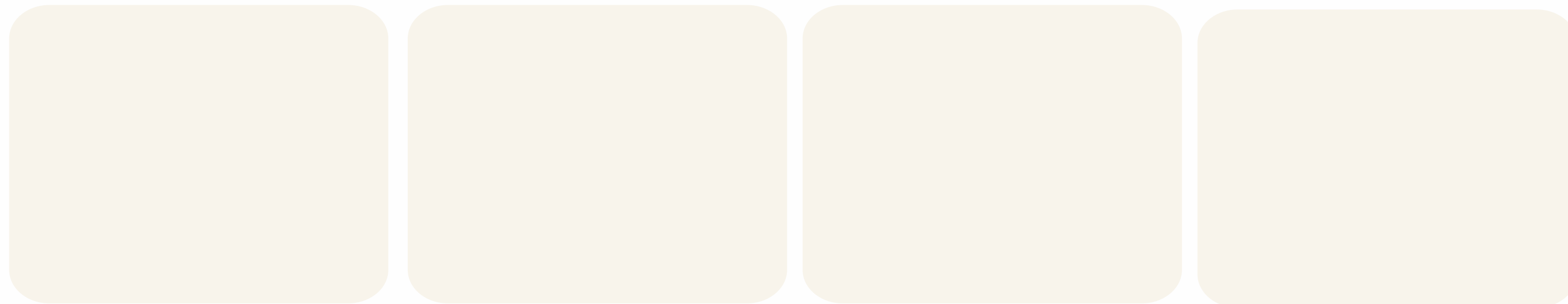


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**Representation
in decision-
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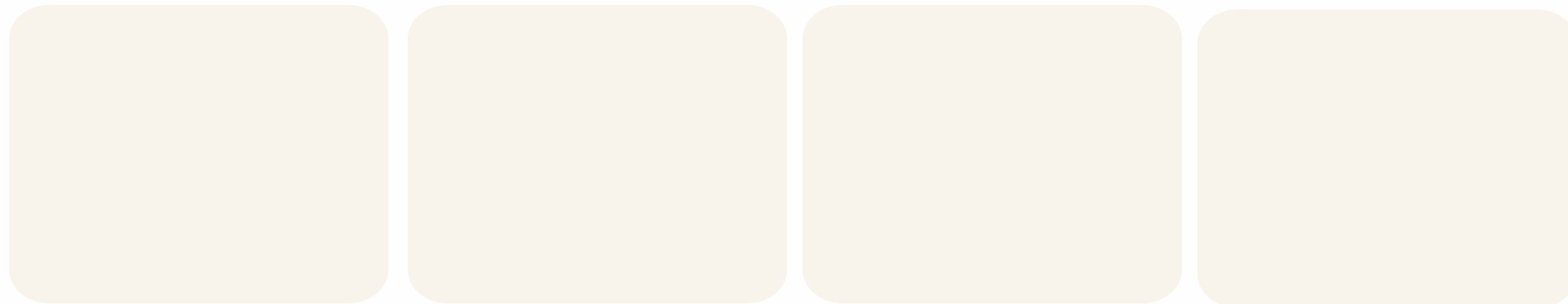
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Inclusivity



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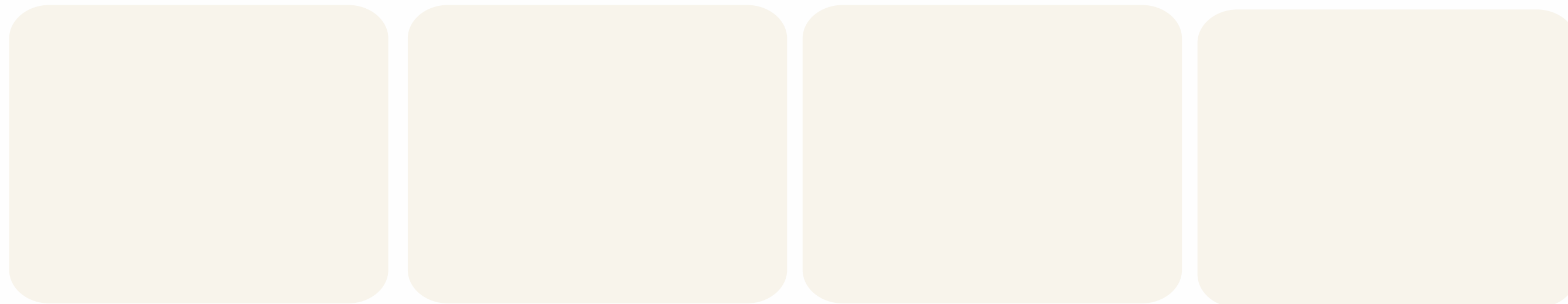
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Harassment

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Conflict
of interest

Related to Duty of Loyalty

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**Right of
refusal**



VOLUNTEER SCREENING PROGRAM



<https://volunteeralberta.ab.ca/for-organizations/volunteer-screening-program/>



UPCOMING

Developing Volunteer Positions

November 22nd, 2023 11 AM – 12 PM FREE

Keep an eye out for the registration link!




Contact Us!



Email us


 screening@volunteeralberta.ab.ca

More resources

 <https://volunteeralberta.ab.ca/for-organizations/resources/>



 StrategicClientManagement@cooperators.ca

 <https://www.cooperators.ca/en/insurance/business/insurance-for-non-profits>

Community Guard is insurance for Non-Profit Organizations;
Affordable coverage and risk management advice.

