

Slide 1: Welcome to volunteer management foundations and the topic of administration. My name is Kim Cusimano Executive Director of PIN, the people and information network, a community benefit sector leader in volunteer engagement, non-profit leadership, and community information in Southern Ontario. I am a graduate of the Conestoga College volunteer management program, leader of volunteers both in paid and unpaid roles, an active volunteer, and an advocate for active citizenship. This module was created alongside my colleague, Emily Vincent, who has the breadth of experience and expertise in volunteer engagement, specializing in volunteer screening through our work in Guelph Wellington.

Slide 2: In this module, our objectives are to provide an overview of administrative functions of the volunteer engagement cycle and recognize the importance of skilled leadership in volunteer engagement and its return on investment for your organization, mission and our society. In this module, you will be introduced to core components of volunteer recruitment and intake, risk management including police record checks and vulnerable sector checks as well as orientation.

Slide 3: In the previous modules, we have learned about the voluntary sector, the value of volunteering, the types of organizations and how they engage volunteers, and now we will explore the supports that encompass the volunteer engagement cycle. Also referred to as the development or volunteer involvement cycle, this graph outlines the circular framework that encompasses the core foundations of volunteer engagement. Beginning with the mission and vision of your organization - you value volunteers and you understand the importance of investment of human and financial resources into service. This circular diagram represents an ongoing, adaptive, and cyclical process with the core goal of impact. Impact for your organization, your mission, your clients or those receiving benefit from the efforts of volunteers, but also the volunteers themselves. This visual will help guide the steps towards success and in this module, we will begin with the assessing of need.

Slide 4: Understanding the need is the fundamental foundation. What is the need? Why do you need volunteers? Is it to fill a gap? Augment service or provide strategic vision? How will volunteers support this need and how will we know we have met the need? These can be completed in a number of ways, depending on the size and complexity of the need. New or existing grassroots group or an organization, your starting points could range from a community-wide needs assessment, corresponding data review, stakeholder engagement, as examples. Are these formal or informal roles? And have you considered all aspects of the ethics around the role? Through the needs assessment, particular attention should be given to how and who is going to support. The impact of volunteer support requires leaders of volunteers who have the skills and resources to support successful engagement.

Slide 5: The development of an overarching volunteer strategy is an important step and will include recruitment. What are you recruiting for? You can create a position description that encompasses the scope of the role, clearly outlines requirements, responsibilities, risk, and the level of that risk linking all volunteer positions to the mission of your organization. And this helps stakeholders, including volunteers understand the impact that volunteers have on the work of the organization. With this information, how will you recruit for this role? Does the role

require volumes of volunteers for an event or a volunteer with a specialized skill? These will require different recruitment strategies and levels of investment. Specialized skills may require advanced actions to cater the ask. We learned in module one about the trends in volunteering in Canada, what takeaways can you use to factor into your recruitment strategy? And as you develop your strategy and supplementary resources, a key question is, are your recruitment methods welcoming? Are you incorporating AODA and accommodations that would support an individual to apply to volunteer with your organization? Does your organization openly welcome individuals of all ages, culture, and communities? And do your organizations practices reflect this? Does your website have a translation feature? Does your volunteer application provide the opportunity for applicants to share? If they do not identify with a gender? Do you use pronouns on name tags? Does your recruitment messaging speak to the audience that you are seeking to engage? Communications with youth versus seniors or young professionals versus families as example can be very different.

Slide 6: What methods will you use to recruit volunteers? Traditional media, digital outreach, such as web, email, and social media. Will there be information sessions, volunteer center portals, provincial associations, and targeted recruitment? Does your organization track how individuals connect with your organization? All points of entry to your organization are methods of recruitment. Give thought and create a path for all entries. Do you assess your methods of recruitment and adjust accordingly? A beta test messaging on outreach communications? What changes are occurring in your local community or broader sector? Do you welcome periodic focus groups that bring diverse perspective to volunteer engagement at your organization? Word of mouth is a highly valuable recruitment tool. Do you evaluate volunteer satisfaction? Recruitment is an ongoing process to build an invitational pipeline to your organization. Your strategy may include concentric circles for a visual example. Peripheral circles may receive newsletters, annual reports, and donor invitations. This is information, initial and ongoing, to build awareness and spark an interest in learning more and becoming involved. Closer to the center may be levels that continue to draw on an individual closer to a role. An invite to an organizational event and/or focus group, for example. An initial yes or no answer may not be the final answer, but we do need to understand varying comfort levels in your outreach along with privacy laws. A one size fits all may not provide your organization or the volunteers a mutually benefiting role.

Slide 7: Your successful recruitment initiatives welcome volunteer applicants and intake offers the opportunity to begin a potential volunteer relationship and involves components that may include, an application and information package, interview and references, police records check vulnerable sector check, TB or tuberculosis testing, or a record of vaccinations, as required. These are important steps to provide record so that you may abide by policy and required legislation related to your organization. To determine if skills and abilities match the needs of the role and to document the experience for growth and development, evaluation, and performance measures along with recognition. Depending on the size and scope of your organization, the application component may be an online form, a sophisticated system, or a simple paper application package, and should all include a notation around the purpose and the collection of personal information. The goal is to gather initial core information your

organization needs to determine if the applicant skills and abilities are the right match for a role. This application also offers the applicant an opportunity to assess your organization for their best fit. The information package may be a resource you choose to provide to build on your initial connect. The interview and references, whether they be over the phone via video call or in-person, consider what fits for the role and ensure a consistent framework to support. Perhaps there's a tiered interview and reference check process. Is it a phone interview for a one-time event with minimal risk? Or perhaps a video interview and two references for a marketing committee role for example. Or is it an in-person interview and three references for volunteer applicants who may work with vulnerable populations? Regardless of your method, you need to obtain consent to check those references.

Slide 8: We will explore screening and police records check shortly. However, first we must understand the importance of diversity, equity, and inclusion in the volunteer engagement cycle. Here are a few questions to begin your review of policies and practices. You can ask yourself, are there barriers to volunteering with your organization through physical space, access, or economic hardship? Do you provide accommodations for volunteer applicants? Is there unconscious bias in selecting applicants for an interview? Do you know what this experience looks and feels like from the perspective of the volunteer? And when developing or reviewing your organization's intake process ensure you have considered legislation around privacy and rights. For example, the privacy act, the personal information protection and electronic documents act, freedom of information and protection of privacy act, and the human rights code.

Slide 9: Volunteers should be able to request access to their personal information, as well as challenge the accuracy and completeness. How will you safeguard personal information? And before you look at how make sure you understand why. What are you collecting is as important as how you're going to safeguard this information. The who, how, what, why, and where type of inventory will be helpful. Who do we collect personal information? What is it? How do we collect it and why? What is it used for? Where is it kept? How is it secured? And who has access and permission to use it? When you disclose information? And when do you dispose of it? Volunteer Canada's screening handbook is a fulsome resource when you are developing and reviewing your policies and practice and will be included in the resource section at the end of this month.

Slide 10: Understanding risk is an important component of the volunteer engagement cycle. Risk to the clients that you serve, the volunteer seeking to be in service, and to the organization. What are the potential risks? And some examples are the safety of clients, participants, peer volunteers, and staff, the legal and financial risk, and the reputation of the organization. Organizations have moral, legal, and ethical responsibilities to the people they reach. Understanding risk assists in mitigating potential issues for all. How do you mitigate risk in volunteer engagement? A risk assessment for each volunteer role using a matrix outlining areas and level of risk is an exceptional tool. As well, Volunteer Canada's 10 steps of screening gives clear guidelines to developing screening policies. And these policies show an organization's commitment to safe and meaningful volunteer engagement. Through those 10

steps of screening. We've actually explored a few of those assessment, position, recruitment application, interview, and references.

Slide 11: Screening is ongoing and includes members, clients, employees, and volunteers. Screening is especially important for organizations that work with vulnerable people. Vulnerable people may include children, individuals living with disabilities, and senior adults. The following factors affect an organization's obligations for screening volunteers. That could be your mandate and the population served, the volunteer opportunities your organization offers, jurisdiction, or legislation, including the Canadian criminal code or Ontario human rights, licensing bodies and accreditations, professional designations and associations, funding agreements, and memorandums of understanding, insurance policies and contracts, and the organization's bylaws policies and procedures to meet above. Throughout the process, there should be clear transparency. Screening volunteers in and not out and it should be aligned with the levels of identified risk.

Slide 12: Assessing the risks associated with the volunteer position determines whether a police record check is required and that's an important first step. It is the requirements of the position description that determine if in fact a police record check is needed. A police record check may be required by law, by an insurance provider, or an organizational policy. Once you know if a police record check is required, knowing the difference between a police information check and a vulnerable sector check will help you determine which one is most appropriate.

Slide 13: A police record check or criminal or judicial matters checks are appropriate when a volunteer works in a position of trust, but is not in charge of or responsible for the wellbeing of vulnerable persons. For example, the volunteer applicant has access to money or confidential information. A volunteer role similar to this does not need a vulnerable sector check, but for other risks, considerations, it may be necessary to require one. Police information checks include existing criminal convictions, upcoming criminal court appearances, and a scan of the local police records in the jurisdiction in which the applicant resides. Keep in mind that they may also include information on alleged crimes in which the person was not charged or convicted. Vulnerable sector checks are requested when a volunteer is responsible for the wellbeing of children under the age of 18, elderly persons over the age of 65, or individuals with physical or mental disability whether that be temporary or permanent. Simply being in contact with a vulnerable person does not warrant a vulnerable sector check unless the volunteer is in a position with significant trust or authority and with unsupervised access to vulnerable persons. A vulnerable sector check determines if the potential volunteer is a pardoned sex offender, and it also includes a search of local and national police databases to ensure the individual does not present a threat to vulnerable persons.

Slide 14: Important information to note- the police record check reform act enacted in 2018 introduced legislation to ensure a clear, consistent, and comprehensive set of standards to govern how police record checks or PRCS are conducted and the type of information that can be disclosed in Ontario. Organizations should request a vulnerable sector check only when appropriate and in accordance with relevant legislation. Did you know that it is an offense to

conduct a vulnerable sector check if the position does not meet the requirements of the criminal records act? Included in the resource section of this module are links for your review, and we encourage you to check the RCMP website or your local police department for details. Ensure that you review information from a police check report only as it relates to the requirements of the volunteer assignment. Follow legislation and organizational policy to determine who should review a police record check and make decisions about the suitability of the individual based on the information provided. And in the end, a police record check is only valid for the moment in time it is issued and it will not include, for example, outstanding charges or warrants. Police record checks are, but one of the tools and the 10 steps of screening, a comprehensive screening practice is an essential component of the volunteer engagement cycle.

Slide 15: You have successfully screened and matched a volunteer to a role. What is next? Orientation and training provide the necessary information to engage in a role safely and with success. It lays organizational foundation including the history, mission, vision, policies, including social inclusion, privacy, and confidentiality, strategic vision, and how volunteers make an impact to that vision. Orientation also provides the opportunity to provide a live virtual or in-person tour of the space including key aspects for volunteers- where to park, where to enter, or where to sign in as example. It may include an orientation to dementia, wheelchair safety, or how the event will unfold. Your orientation provides an overarching view of their involvement, notes important items such as the policies, procedures, and emergency protocols, and can provide the opportunity to build upon your initial connection and peer connections. In your orientation, whether online, a virtual live, or in-person, there are key aspects to consider. Do you use clear communications with inclusive language, captions, and images? Do you include transcripts of closed captions or orientation materials available for access for an individual who does not have a computer or internet connection?

Slide 16: Volunteers are the strength of your organization and a direct link to the community. It is important to demonstrate the value of volunteers within your organization, through building relationships with them in meaningful ways and sharing stories of their great work. From the board of directors, senior leaders, and staff throughout the organization, there needs to be a commitment to appreciate and recognize volunteers. It is essential to share information about the impact of their involvement in contributing to the organization's mission with an aim of creating a culture that truly values volunteers. Developing a comprehensive volunteer appreciation and recognition strategy is essential to helping volunteers feel valued. A recognition strategy should include a wide range of actions from a heartfelt thank you to highlighting the impact of the overall contribution of volunteers within your community and on a broader scale. Celebrating the contributions of volunteers during national volunteer week promotes their contributions and joins them in the important work of millions across Canada.

Slide 17: Volunteers have impact. Your organization's investment of resources, including the skills of a volunteer engagement professional, and the finances to support a volunteer involvement strategy and action will return. Use the volunteer management foundations to build the strong footing for the future. Thank you for your interest and investment of time and

learning around the volunteer management foundations with the topic of administration. Please find the available resources, quiz, and reflection included in this module. In the next module, you will explore a volunteer management foundation and the topic of program delivery.