



**Volunteer
Toronto**

Advanced

Volunteer Handbook Sample

Resource Guide & Workbook

Compiled by Engaging Organizations Department

Volunteer Centre of Toronto
344 Bloor St. West, Suite 404
Toronto, ON, Canada M5S 3A7

T 416.961.6888

F 416.961.6859

E info@volunteertoronto.ca

volunteertoronto.ca

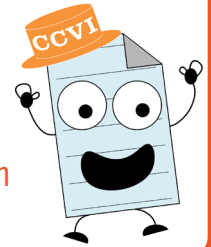
Using this Resource Guide & Workbook

The Volunteer Handbook Sample resource guide & workbook has been compiled by Volunteer Toronto to help community groups, non-profits and charitable organizations with the basic tools to create volunteer handbooks/manuals for orientation and ongoing volunteer engagement. Most examples are based on Volunteer Toronto's materials, and it is important to remember that these are guidelines informed by best practices; you can adapt them to your situation as needed.

Using this Volunteer Handbook Sample

Every volunteer should receive an orientation to their new role and the organization, and accompanying this should be a handbook including the policies & procedures that they need to know. In this workbook, you'll find a detailed sample volunteer handbook using draft and sample policies, policy information, forms and statements you can adapt for your own organization. Throughout the workbook, you'll find annotations and notes covering the legal aspects of each policy, if any, and other notes for your own adaptations. The contents of this workbook are as follows:

Hey there, I'm Paperguy! I'll pop in throughout this workbook to provide some thoughts and notes. Look for me to provide the legal aspects of each policy too!



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Introduction & Orientation

Welcome to Volunteer Toronto!

As Canada's largest volunteer centre, Volunteer Toronto has been serving the public since 1973 to build a caring and committed community of people who give their time towards building a healthy Toronto. We support job seekers, high school students, newcomers, retired individuals and just about anyone looking to use their time to give back. As a volunteer for Volunteer Toronto, you're contributing to a better Toronto.

Our Mission

Our mission is to help create the best possible volunteer experience.

Our Vision

Our vision is to create engaged communities through volunteer action.

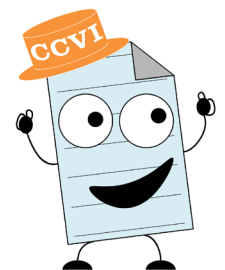
Specifically, we shall:

- Be recognized as a 'centre of excellence' for volunteer services and support
- Develop innovative approaches to volunteering
- Bring leading-edge products and services to our city
- Develop professionalism, collaboration and competence among our staff
- Be recognized for our high level social and community impact

Our Values

- Volunteering contributes to the vitality and capacity building of the community
- Volunteers and the professionals that support them are an integral component of the voluntary sector
- Honesty, integrity and fiscal responsibility are demonstrated in all areas of our work
- Diversity of community stakeholders are respected through the model of Cultural Competence and is reflected in policies and service delivery
- We believe sharing of experience and knowledge is the cornerstone of community and leadership development

Starting with an orientation to your organization can help place the volunteer's role in the context of the work you do. This initial description also links the volunteer's work to the mission so that they can know what to expect. Including your mission, vision and values can also help volunteers ensure they're a good fit for the organization!



Contact & Role Information

Here at Volunteer Toronto, you'll report to the primary supervisor of your program. Include their contact name, phone number and e-mail address here:

Supervisor:

Phone number:

E-mail:

For general concerns, or if you can't contact your supervisor, contact the general volunteer administrator at: volunteers@volunteertoronto.ca / 416-961-6888 x200

Even if your volunteer already knows who their supervisor is, having this information handy will be useful down the road. We've included a generic contact for the "general volunteer administrator," but here you should include your contact info as a volunteer manager. If the volunteer won't have a program supervisor and simply reports to the general volunteer manager, you can omit the first section.

Programs & Roles

Volunteer Toronto's work is split into two main areas: community serving and organization serving. Here are the volunteer roles within these program streams:

Community Engagement

The Community Engagement department works with volunteers and potential volunteers to inspire them to volunteer and let them know how to get started. Working with diverse audiences, volunteers here will support the client-facing operations of Volunteer Toronto.

- **Referral Counselors**

Help clients find volunteer roles through our online listings via in-person and phone appointments

- **Outreach Volunteers**

Represent Volunteer Toronto at community events and for different audiences, as well as facilitate community outreach & information sessions

- **Youth Volunteer Ambassadors**

Facilitate volunteer groups in high schools across the city and encourage more youth to volunteer

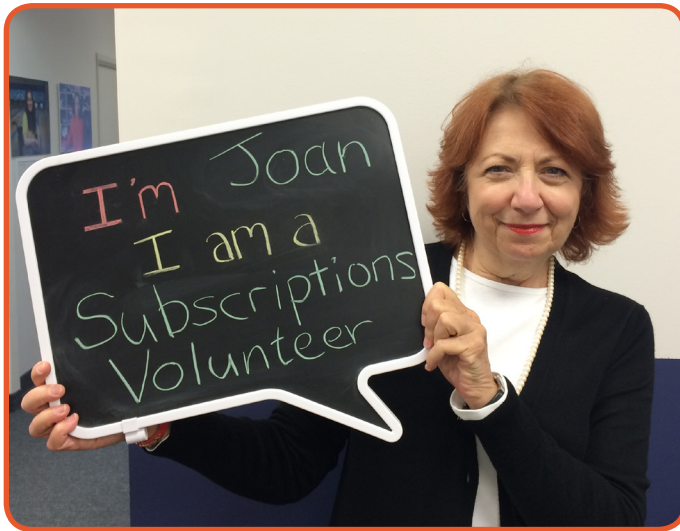
- **Youth Advisory Council**

Help guide Volunteer Toronto's youth engagement initiatives



Engaging Organizations

The Engaging Organizations department works with hundreds of non-profit and charitable organizations across Toronto to help them find volunteers and develop great volunteer programs. Volunteers in this department support the organizations requiring our services.



- **Subscription Assistant**

Through phone calls, e-mails, research and data collection, support the Subscriptions Manager and the hundreds of organizations that subscriber to our services

- **Research Assistant**

Support research efforts examining trends and changes in the voluntary sector

Organization-Wide Volunteer Roles

Some volunteer roles support the entire organization in a variety of ways:

- **Director**

Sitting on the Board of Directors in a variety of potential roles, determine oversight and provide support for strategic planning organization-wide

- **Events Support Volunteers**

Provide assistance for planning and coordination of a variety of events including volunteer fairs and premier events including the Legacy Awards & VECTor Conference

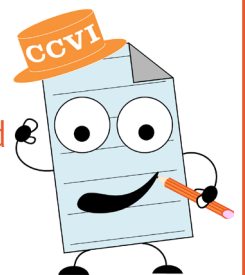
- **Photographer/Videographer**

For a variety of needs, including events and campaigns, photographers/videographers capture moments for use on social media, online and in print

- **Social Media/Website Volunteer**

Assist with organizational communications through social media and Volunteer Toronto's website

Include the volunteer's full role description here along with the other potential roles. This gives the volunteer a sense of the other ways their skills could be used or other directions they could go as a volunteer.



Rights & Responsibilities

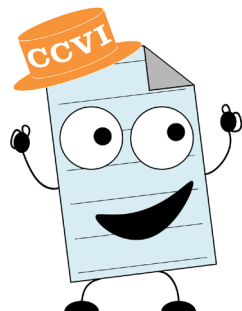
As a volunteer, you have rights and responsibilities. Volunteer Toronto believes volunteers are a vital human resource and commits to the appropriate infrastructure to support volunteer engagement.

Volunteers have the right to:

- Work in a safe & healthy workplace, to know about unsafe work and to refuse unsafe work
- A supportive environment in which to work and contribute
- Effective and meaningful volunteer involvement practices
- Have their say about their work and ideas regarding their role or program
- Provide feedback and receive feedback when requested and at regular intervals
- Be reimbursed for transit expenses to and from the Volunteer Toronto office (see General Volunteer Policies, page 6)
- Ask for and receive support from their supervisor when required
- Be accommodated for any ability needs in order to complete non-essential tasks of the role

Volunteers have a responsibility to:

- Act with respect for the cause, community, organization and its work
- Act responsibly and with integrity
- Fulfill the duties of the role as defined in the position description, efficiently and effectively
- Respect all policies in place
- Notify their supervisor if they are unable to fulfill their duties or miss a shift
- Recommend suggestions and changes if they determine any



Volunteer rights and responsibilities are one of the cornerstones of the Canadian Code for Volunteer Involvement – click [here](#) to learn more about the Code and the benefits of adoption. Ensuring volunteers are aware of their rights and responsibilities will make them feel valued and like their work is important, and it will give the volunteer program more credibility.

General Volunteer Policies

The following section outlines important policies and policy statements for volunteers to be aware of and adhere to. If you have any questions about policies, please consult your supervisor for more information.

You should have all of your volunteer policies readily available to volunteers in some way, whether through a hard-copy printout or an online location.

Record Keeping



Volunteers are required to keep track on a monthly basis of the numbers of hours spent volunteering at Volunteer Toronto using Timecounts. Training on the Timecounts software will be provided and the system can be accessed at home or during volunteer shifts at the office. Record keeping is necessary to ensure required hours are being met and reference letters and/or certificates, if available, accurately depict the number of hours completed.

Dress Code

Volunteer dress codes vary and are dependent on the requirements of individual roles. Volunteer Toronto implements a casual dress code and makes no distinctions or preferences based on gendered clothing. Any clothing may be worn (with the exception of jeans with rips), and footwear of any kind is appropriate. You may at times be required to wear a Volunteer Toronto t-shirt, which will be provided.

It may be necessary for Volunteer Toronto to amend the dress code to accommodate the needs of certain events. If amendments are made, these will be made clear to the volunteer in advance of the affected shift, and volunteers may decline that shift with no negative impact on their volunteer record.

Unless considered a safety hazard, choices about the following are left to individual volunteers' judgment:

- Haircut, style, and colour
- Tattoos, piercings, and other body art
- Religious & culture-specific attire & jewellery

This dress code statement is part of a full dress code policy that you can include; it's likely only necessary to highlight what the



volunteers immediately need to know. Try not to discriminate between genders in your dress code as any clothes can be worn by any person.

Speaking on Behalf of Volunteer Toronto

No volunteer may act as an official spokesperson for Volunteer Toronto without designation by the Board of Directors or Executive Director. Volunteers are encouraged to promote Volunteer Toronto's work in formal and informal settings which do not include media interviews.

If volunteers are asked to speak about their work with Volunteer Toronto at a formal event, they shall inform a staff member and seek information on current client trends, any upcoming promotional events, or current fund-raising goals.

Social Media Statement

Volunteers are encouraged to share their experience with friends, family and networks. Volunteer Toronto can be found on Facebook, Twitter, Instagram, LinkedIn, Youtube and Tumblr - and social media is a great place to share experience. Follow, like & tag Volunteer Toronto and share photos & status updates to show the world what it's like to volunteer at Volunteer Toronto.

General Policies

Volunteers must notify their direct supervisor if they will be unable to fulfill a commitment for any reason; if the supervisor cannot be contacted, contact the general volunteer administrator.

Volunteers are required to attend orientation to the organization and training relevant to the needs of their role to ensure they can perform their duties safely and effectively. If a volunteer doesn't receive this training, they should contact the general volunteer administrator.

Volunteers must complete the Emergency Contact Form (page 24) to ensure that Volunteer Toronto has important information on file in the event of an emergency. By signing this form, volunteers consent to this information being stored for the duration of the volunteer's engagement and only used in emergency situations.

Volunteers must complete a Confidentiality Pledge Form, Computer Use Form and Acceptance of Role & Responsibilities Form (pages 28). Signing these forms ensures volunteer work will comply with relevant legislation, not breach any confidentiality and privacy policies (more details on page 8) and can be performed effectively.

All volunteers are entitled to reimbursement for TTC tokens to and from Volunteer Toronto for meetings and shifts. Coffee, tea, and spring water are also available on the premises.

Consider anything you need the volunteer to know, including office dietary restrictions, seasonal operations changes, and more.

Privacy & Personal Information Policy

This is Volunteer Toronto's Privacy & Personal Information Policy. Please note that you are included in this policy and your personal information will be kept secure. By volunteering with Volunteer Toronto and signing the Acceptance of Role & Responsibilities form (page 28) you are consenting to your information being collected and stored for the purposes of volunteer engagement.

Policy Title: Privacy & Personal Information Policy

Approval Date: July 20, 2016

Purpose

In adherence to the Personal Information Protection and Electronic Documents Act, this policy ensures the privacy and protection of volunteers' personal information.

Policy Statement

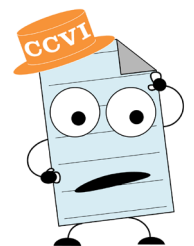
Volunteer Toronto is committed to protecting the privacy of personal information of all stakeholders in the organization including volunteers. This is in accordance with federal and provincial government privacy legislation to ensure the collection, safeguarding and appropriate disclosure of personal information. Pursuant to this policy, all individuals have the right to their own personal information stored and used by Volunteer Toronto.

Definitions

"Personal Information" includes any information about an identifiable individual, including race, ethnic origin, colour, age, marital status, religion, education, medical, criminal, employment or financial records, address, telephone number, e-mail address, numerical identifiers such as Social Insurance Number and views or personal opinions.

"Provincial and federal law" refers to the Freedom of Information and Protection of Privacy Act as administered by the Government of Ontario (where related to government, crown agencies and institutions collecting data) and the Personal Information Protection and Electronic Documents Act as administered by the Federal Government (where related to all other activities of Volunteer Toronto).

Only government agencies, municipalities, and institutions (including health care, colleges & universities) must follow the Freedom of Information Protection of Privacy Act, which has its own requirements. All other organizations are only subject to the Personal Information Protection and Electronic Documents Act.



Application/Responsibilities

Volunteer Toronto collects and uses personal information from volunteers to support program delivery and for the following specific reasons:

- Application and recruitment process of volunteers
- Maintaining contact with volunteers to ensure coverage of shifts and responsibilities and letting volunteers know of opportunities
- Satisfying statistical reporting requirements (such as locations of volunteers) detached from personal identifiers
- Accommodating volunteers with disabilities, illnesses and/or injuries
- Supporting ongoing training and development

It is the responsibility of the organization and volunteer supervisors to request consent for a new use of personal information.

The organization is expected to only disclose specific information as dictated by funding requirements and where applicable by provincial and federal law. No information will be disclosed without prior consent from volunteers with the exception of information made anonymous.

It is the responsibility of volunteers to provide consent for the collection of their personal information.

It is the responsibility of volunteer supervisors to determine how long they will retain volunteer information after the volunteer has ceased their engagement with the organization.

Procedures

Consent Statement

By signing the Acceptance of Role & Responsibilities, I consent to my personal information being collected for the sole purpose as indicated. I acknowledge that my information will be used, safely stored and protected by Volunteer Toronto for the duration that it is needed.

Information Storage

All personal information will be stored in digital copy on Volunteer Toronto's secure shared drive and in physical copies in the relevant volunteer supervisor's files. These physical files will be locked in a cabinet or filing space only to be accessed when necessary. Personal information will be kept for the following durations:

- Reference information will be kept until 3 months after the interview process
- Volunteer general information will be kept for 5 years from the end date of their engagement
- Role-specific information will be made anonymous 1 year after the end date of a volunteer's engagement

At the end of these terms, volunteer information will be destroyed or made anonymous for statistical purposes.

Disclosure

Under most circumstances, personal information will be used by volunteer coordinators to match roles and maintain contact with active volunteers. Certain information may be disclosed under the following circumstances:

- Funder statistical requirements & reporting
- Regional volunteer location assessment
- Subpoena, warrant, court order or government request

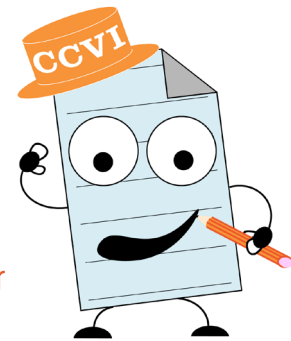
Volunteer Toronto will not provide names and contact information of volunteers to other organizations or companies without prior explicit consent.

Personal Access

Upon written request and with reasonable notice, all current and former volunteers (within the aforementioned timeframes) can access their own personal information, affirm or challenge its accuracy and request amendments when necessary.

Challenges to collection, use or disclosure of personal information are to be resolved immediately by the Executive Director and complainants notified of their right to seek additional information or file complaints with the Office of the Privacy Commissioner of Canada. All challenges and complaints will be responded to in writing.

This is a robust set of Procedures for this policy. You must include statements about storage, disclosure and personal access, so include the details relevant to you. The consent statement should be listed on actual forms the volunteer will sign, but is not necessary here. In terms of retaining files, there is no standard for the length of time, but the Personal Information Protection & Electronic Documents Act recommends that their files be deleted or made anonymous after a reasonable amount of time.



Resignation & Termination Policies

These are Volunteer Toronto's policies on Volunteer Resignation and Volunteer Termination. These policies are in place to ensure you are aware of the process for resigning from your volunteer role, as well as the process for termination if necessary.

Policy Title: Resignation Policy

Approval Date: July 20, 2016

Purpose

To ensure that clear and reasonable notice, as described below, is provided to Volunteer Toronto by volunteers.

Policy Statement

Volunteers should provide their direct supervisor with written notice of their resignation. It is expected that volunteers will give a minimum of one (1) week notice, except in the circumstance of family or medical emergency. Volunteers are not obligated to provide a reason for resignation. However, volunteers who provide less than one week's notice and do not disclose a family or medical emergency may not be invited back to Volunteer Toronto for a minimum of three (3) years.

Determine the reasons that work for you and your organization for exceptions to this policy. In this case, family or medical emergency are allowable, but there may be other options as well.

Application/Responsibilities

Volunteers who wish to resign from their position should follow the procedures described below. Staff supervisors are expected to know and understand Volunteer Toronto's policy and procedures on volunteer resignation.

This policy will be reviewed annually by all staff who engage volunteers to ensure accuracy and any changes to Volunteer Toronto's volunteer involvement landscape. The Board of Directors will review policy changes as they arise on a yearly basis.

Failure to follow this policy could result in the disruption of services at Volunteer Toronto.

Procedures

Resignation Provided with a Minimum of One Week's Notice

Volunteers who wish to resign from their position and do so with a minimum of one week's notice must write a letter stating their intention and the last date of volunteer service. The resignation letter should be forwarded to the volunteer's direct supervisor electronically or provided in hard copy. Staff supervisors will acknowledge in writing receipt of resignation letters that are provided via email.

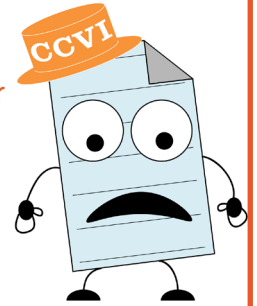
A copy of the resignation and acceptance of resignation will be kept on the volunteer's record for a minimum of three years.

Resignation Provided with Less than One Week's Notice

Volunteers who wish to resign from their position and do so with less than one week's notice must write a letter stating their intention and last date of volunteer service. The resignation letter should be forwarded to the volunteer's direct supervisor electronically or provided in hard copy. Staff supervisors will acknowledge in writing receipt of resignation letters that are provided via email.

Volunteers may disclose a family or medical emergency as a reason for resignation to any Volunteer Toronto staff member in person, over the telephone, or in writing. If an emergency is provided as the reason for sudden resignation, this will be indicated on the volunteer's record, and the volunteer may apply to return to Volunteer Toronto at any time. If no emergency is disclosed, the volunteer may not be welcome back to Volunteer Toronto for a minimum of three years.

This policy uses the language “may not be welcome back” which does leave the door open for volunteers to return in the future. Use your discretion on whether you'd allow this, and also determine how long the timeframe is you're working with.



Policy Title: Termination/Dismissal Policy

Approval Date: July 20, 2016

Purpose

To ensure that dismissal of volunteers is fair, equitable and reasonable based on the process herein and the expectations, responsibilities and consequences of volunteer actions.

Policy Statement

Volunteer Toronto has the right to dismiss any volunteer whose actions have not supported the vision and mission of the organization and/or who has violated Volunteer Toronto's policies, procedures, boundaries and position responsibilities.

Application/Responsibilities

Volunteer supervisors within the organization will determine the responsibilities of each volunteer role – along with any associated expectations, boundaries, duties and rules that are appropriate. Volunteers will also sign an Acceptance of Role & Responsibilities including appropriate behaviour, rights and responsibilities, revised annually by the Policy Review Team.

It is the responsibility of every volunteer coordinator and supervisor to ensure volunteers are aware of their expectations and responsibilities, and all possible consequences for failing to meet these expectations, breaching a boundary, or inappropriate behaviour.

It is the responsibility of volunteers to understand their expectations and be aware of the dismissal policy and process to follow each step accordingly.

Procedures

The following are considered grounds for immediate dismissal:

- Illegal, violent and/or unsafe acts (will also involve Toronto Police Services)
- Theft of property or misuse of Volunteer Toronto funds, equipment or materials
- Being under the influence of alcohol or drugs while performing volunteer duties
- Any action or behaviour that causes harm to clients

All volunteers are subject to a probation period as determined by their supervisor and as outlined in their position description. During this probation period, the following procedure may not apply as volunteers may only receive one or no warnings for improvement, depending on the severity of the issue. The following procedure applies in all other cases besides probation and the immediate dismissal grounds listed above:

1. Any instance of failure to meet the requirements of the role, behave within the boundaries and Code of Conduct and/or misrepresent or contravene the mission of Volunteer Toronto will be documented in the volunteer's file using an Incident Report. Each occurrence will be shared and followed-up with the volunteer. A plan will be created to improve behaviour and ensure instances aren't repeated.
2. If such occurrences are repetitive or frequent, the volunteer will be given a warning in person and in writing. This warning will be recorded in the volunteer's file.
3. Depending on the severity of the issue, the number of warnings before termination will vary – a standard consideration should be 2 warnings, as the volunteer will be given opportunities to improve after each and the failure to improve after the 2nd warning would warrant dismissal.
4. The duration between the last warning and informing a volunteer of their dismissal should be no more than 2 weeks – this depends on the volunteer's engagement (daily, weekly, monthly, occasional) and should still allow for volunteers to improve behaviour and performance if possible.
5. An appointment should be scheduled to inform the volunteer of the decision to dismiss them in person – present at this meeting will be the direct coordinator of this volunteer and one other member of senior staff. The volunteer is invited to bring another volunteer or any other person for support purposes. **This meeting is to inform the volunteer of the decision, not to discuss or potentially change the decision.**
6. The volunteer should be supplied with a confirmation of their termination in the form of a Dismissal Letter, signed by their supervisor and the Executive Director.

Your dismissal policy should be clear and succinct; don't dance around the topic as volunteers need to know clearly what could get them dismissed, and what the process looks like. In this sample, the "Acceptance" sign off can be replaced with a more detailed Code of Conduct.

Workplace Violence & Harassment Prevention

Volunteer Toronto's Workplace Violence & Harassment Policy and Human Rights & Anti-Discrimination Policy work in tandem to ensure volunteers work in an environment free from violence, harassment and discrimination.

Definitions

Discrimination means any form of intentional or unintentional unequal treatment based on a protected ground of the Ontario Human Rights Code that results in disadvantage, whether imposing extra burdens or denying benefits. Discrimination needs only to be one factor among many factors in a decision or action for a finding of discrimination to be made. (See Human Rights & Anti-Discrimination Policy)

Harassment means a course of comments or actions that are known, or ought reasonably to be known, to be unwelcome. It can involve words or actions that are known or should be known to be offensive, embarrassing, humiliating, demeaning or unwelcome.

Workplace is any area where tasks are carried out on behalf of an organization. This can be an office, a private residence during times when tasks for an organization are taken on, or a public area during times when staff or volunteers are carrying out activities related to an organization.

Workplace violence is the exercise of physical force by a person against a worker (volunteer or staff member), an attempt to exercise physical force against a worker, or a statement or behaviour that it is reasonable for a worker to interpret as a threat to exercise physical force against the worker, in a workplace, that could cause physical injury to the worker.

Complaints

Volunteers who lodge good faith complaints may do so without fear of retaliation or reprisal. Alleged retaliation or reprisals are subject to the same complaint procedures and discipline as complaints of discrimination and harassment. Complaints will be kept confidential, with disclosure only occurring if deemed necessary to adequately resolve issues.

Complaints issued that are found to have been made in bad faith will be subject to disciplinary action, up to and including dismissal.

Responding to Complaints of Harassment or Discrimination

Volunteers who feel they have been the target of harassment or discrimination have three options for managing the concern:

1. *Direct Communication* – With little intervention from Volunteer Toronto, complainant can communicate directly with the person who behaved inappropriately
2. *Informal Complaint* – With assistance from Volunteer Toronto, complainant can lodge an informal complaint and not communicate directly with the accused
3. *Formal Complaint* – With assistance from Volunteer Toronto, complainant can lodge a formal complaint with the possibility of taking legal action against the respondent

Detailed information can be found in the *Workplace Violence & Harassment Policy*.

Accessibility Statement

In order to better serve clients, Volunteer Toronto strives to ensure that service delivery supports the core principles of the Accessibility for Ontarians with Disabilities Act (AODA): independence, dignity, integration and equal opportunity. Volunteers will receive appropriate training on the AODA, its Customer Service Standard and the knowledge to effectively serve all clients. Volunteers are also engaged in an accessible recruitment process and are encouraged to identify any accommodations needed to fulfill their role effectively.

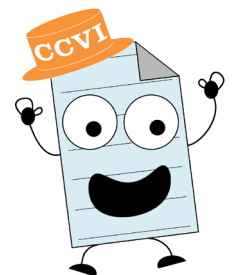
Volunteer supervisors shall:

- Be asked to assess & identify the actual abilities needed for a volunteer position when posting opportunities
- Ensure that volunteering premises are as accessible as possible and provide an accessible washroom and low-scent environment; this applies to on-site and off-site facilities
- Check appointment, interview and registration information for accommodations of volunteers or clients ahead of meetings, sessions or other events
- Provide training to volunteers on the Customer Service Standard in regards to techniques and knowledge required to effectively serve clients with disabilities
- Accommodate volunteers when possible to ensure they can complete duties of their role with minimal or no barriers

Volunteers will be trained and effectively prepared to:

- Allow clients with disabilities to use assistive devices to access our services and provide other measures wherever possible and when needed
- Welcome guide dogs or other certified service animals to accompany clients in any area of the premises open to the public
- Encourage anyone with a disability to have their support person accompany them to attend an office visit, training session or special event – support persons are welcomed and not charged for event admissions
- Make adjustments to shared space (training room, waiting area, interview room) for assistive devices, a service animal or a support person
- Communicate with people with disabilities in a manner that takes into account the person's disability, including alternate forms of communication (verbal, written, digital) based on individual need

It's one thing to ensure Customer Service Standard training is provided to all volunteers, as the AODA requires; it's entirely another to ensure your volunteer program is accessible to volunteers of all abilities! An accessibility statement dictates the responsibilities of supervisors and volunteers. Be sure to include specific items volunteers should be aware of regarding accessibility in your facility and programs.



Volunteer Feedback & Evaluation

As noted in the Rights & Responsibilities (page 5), volunteers are entitled to provide and receive feedback. This feedback should be given at regular intervals and when requested, and given at regular intervals and when appropriate.

Volunteer supervisors are responsible for determining the appropriate length of time within which to assess volunteers through a formal evaluation process, and will inform you of this timeframe. The organizational average is three months since the beginning of your engagement. Along with supervisor feedback, volunteers have the opportunity to provide feedback on their role, the program and any other issues.

Volunteers are also encouraged to provide immediate feedback when necessary, and/or request a meeting with their supervisor when in need of support or to provide feedback. Volunteers are invited to provide feedback via an exit interview when they leave the organization.

Templates

The following templates are for volunteer supervisors to evaluate volunteer performance in the following areas:

- Fulfilment of role requirements & tasks
- Fulfilment of overall requirements including tracking shifts
- Communication
- Relationships

Informal Template

Part 1 - Supervisor Items to Address

Knowledge of the Position – *Volunteer* has: overall knowledge of the position/tasks and relationship to the agency, do they meet or exceed requirements or need improvement

Quality of Work – *Volunteer* is: accurate, thorough, follows procedures, fulfills duties

Two-way feedback is integral to a successful volunteer program, and consistent feedback and review of volunteers can help them grow and improve. Be open to receiving feedback from volunteers and acknowledging the suggestions and changes they can provide.

Dependability – *Volunteer* is: timely, attends shifts, punctual, meets goals, reliable

Teamwork/Interpersonal Relations – *Volunteer* has: ability to work with others; positive relations with staff, other volunteers and clients; cooperative nature

Personal Qualities – *Volunteer*: takes initiative, is creative, goes beyond the call of duty, is willing to help in other areas

Other Issues/Concerns/Suggestions Supervisor may have?

Part 2 - Volunteer Discussion

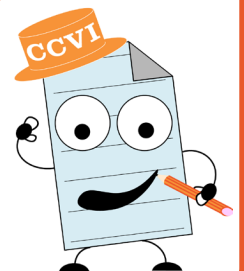
Are your needs being met? *Do you*: require more training? Require more organizational information? Need clarification on policies/procedures? Need more responsibilities, hours, or work?

Are your expectations being met? *Is the position*: what you expected? Keeping you interested in continuing? In line with Volunteer Toronto's mission? Meeting your needs?

What is your overall satisfaction with Volunteer Toronto and with the actual position?

Other Issues, Concerns, and/or Suggestions
Volunteer may have?

Choosing the right template – and format – depends on the needs and type of volunteer evaluation. For scheduled recurring evaluations, the formal template can help you see improvement over time. For quick check-ins and impromptu evaluations, the questions in the informal template can provide a great start.



Formal Template

Volunteer Evaluation		
Volunteer Name:		Date:
Area	Comments and/or Suggestions for Improvement	Rating
Does the volunteer... <ul style="list-style-type: none"> • fulfil the requirements of the role • meet deadlines on a regular basis • have an adequate/reasonable workload • have the appropriate resources to fulfil their role 		
Does the volunteer... <ul style="list-style-type: none"> • arrive for their shift on time • fill out their volunteer log • check in with you or staff when they arrive 		
Does the volunteer... <ul style="list-style-type: none"> • communicate issues with you • ask you for strategies and advice to help them succeed • show improvement each shift/evaluation • seek and take your advice 		
Does the volunteer... <ul style="list-style-type: none"> • relate well with stakeholders • relate well with staff • build and maintain effective working relationships 		

Rating Scale:

1 (Below Target) - 2 (Approaching Target) - 3 (On Target) - 4 (Above Target) - 5 (Beyond Target)

I acknowledge that my supervisor has gone over this evaluation with me in full, and I understand the areas in which I need to improve.

Volunteer Signature		Supervisor Signature	
---------------------	--	----------------------	--

This survey can be used by volunteers to provide feedback to supervisors, but is not necessary.

Name	
Position	
Period of Evaluation	
Supervisor	

Rating Scale:

1 - Needs Improvement **2** - Fair **3** - Good **4** - Very Good **5** - Excellent

Orientation & Training

The goals and purposes of Volunteer Toronto were clearly explained	1	2	3	4	5
The description for the position was reviewed and procedures were explained	1	2	3	4	5
Boundaries were identified and consequences were made clear	1	2	3	4	5
Training was effective and provided the tools needed to perform the assigned task	1	2	3	4	5

Comments:

Supervision

Supervisor was available when I had questions or needed information	1	2	3	4	5
Supervisor's attitude was professional	1	2	3	4	5
Expectations were clear and supervisor was transparent	1	2	3	4	5

Comments:

Workload

The role provided enough tasks and responsibilities to keep me busy	1	2	3	4	5
The time commitment for the role provided adequate time to complete tasks	1	2	3	4	5
There were opportunities to expand my role or my workload	1	2	3	4	5

Comments:

What other training or growth opportunities would you like to see offered?	
What additional tools would make your work more effective and/or pleasant?	
How could Volunteer Toronto improve its volunteer – staff structure and/or relationships?	
Do you have any additional questions or comments?	

Signature of Volunteer		Date	
Signature of Supervisor		Date	

Screening Process

The screening process undertaken to obtain all volunteer roles in the organization is consistent across departments and programs. This is in order to ensure a process that is compliant with human rights legislation and allows the right volunteers to find the right volunteer roles. If at any time volunteers wish to switch roles within the organization, they will be subject to the same screening process as external potential volunteers.

In the screening process, candidates will:

- Fill out an Application Form or follow similar Application Requirements from postings on the Volunteer Toronto website
- Submit additional requirements based on their relevance to the role communicated to applicant and as determined by the risk assessment
- Be interviewed in a single- or multi-phase process by one or more staff
- Submit personal and/or professional references if required for the purposes of selection
- Attend orientation & training if selected for the volunteer role

All staff recruiting volunteers will:

- Post application information (Form/requirements) on the Volunteer Toronto website, along with any additional requirements for the role as determined by the risk assessment
- Interview candidates who best meet the requirements of the role via phone and/or in-person
- Contact references if required for the purposes of selection
- Decline candidates who had been selected for interviews that do not meet the requirements of the role
- Prepare or provide orientation & training for new volunteers that are selected

Application Form

Either using the completed application form already on file or completing a new one, individuals must submit an application form including necessary personal information (such as name, e-mail address & phone number) and questions relevant to the position, if applicable.

Additional requirements may be requested, including writing samples, cover letter and references. To request **police reference checks** or **vulnerable sector screenings**, the following criteria must be met:

- There is a bona fide reason to request this check – examples include working with vulnerable clients (seniors, youth, people with disabilities), handling money, driving, or certain unsupervised programs
- The check is not requested until the final round of the screening process (after interviews) to ensure the candidate is a right fit for the role
- Any information found on the check that is not relevant to the role or its requirements will be disregarded and have no impact on decision making

Interview

Interview questions are developed in advance and designed to discover the presence of skills, competencies and experience of candidates for the specific role, related to the duties, responsibilities and activities of the role. A phone/online video call interview can be a first round, or the only interview round, if the information and format will be applicable for the role. Detailed records are kept of each interview, including notes of comments made by volunteer candidates and interviewer concerns; this record is available to volunteers at any time.

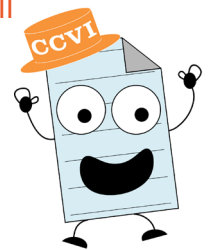
References

References may be requested at any time, but candidates must provide consent to contact references. **References will not be contacted until the final stage of the screening process, and must be contacted by staff for the candidate who has been tentatively selected for the role.** Notes of the comments from reference conversations will be kept in the volunteer file, with contact information kept confidential.

Volunteer Toronto recommends the use and selection of the following as acceptable references:

- At least one person who has served in a supervisory capacity with the volunteer in paid or unpaid settings
- At least one person who knows the volunteer personally and can vouch for their experience as listed
- Additional references based on the level of risk in the role
- Partners, spouses, family members and medical professionals of the volunteer may not be used as references

It's useful for existing volunteers to know that references will be contacted if they're being considered for a new role, and it's an important practice for new volunteers as well.



Next Steps

Supervisors will determine the timeline for the screening process if a second or third interview will be required. Any additional requests from volunteers will be equitable to all candidates of that stage in the screening process, such as police reference checks or samples.

Forms

Volunteer Confidentiality Pledge

In my capacity as a volunteer at Volunteer Toronto I may learn personal facts about staff, volunteers, clients and member agencies. I may become aware of confidential information related to the operation of the organization. I understand that I must exercise due diligence and caution in any discussion related to Volunteer Toronto and its business.

I understand that confidential information may be disclosed to me in the course of my duties and will not be divulged unless I believe that it is necessary and would only do so to my immediate supervisor.

I also understand that confidentiality is not limited to my current affiliation with Volunteer Toronto and that it continues in perpetuity.

Signature: _____

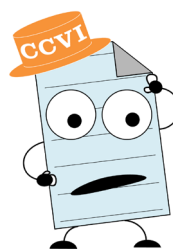
Name: _____

Date: _____

Witness: _____

Date: _____

Include a link to your confidentiality policy to help clarify this “pledge” for volunteers. Their sign-off may also need to be accompanied by training to further elaborate the importance of confidentiality.



Volunteer Emergency Contact Information

Name: _____

Address: _____ Postal Code: _____

Phone Number: _____ E-mail: _____

Date started with Volunteer Toronto: _____

Contact Person: _____

Relationship: _____

Home Phone: _____ Work Phone: _____

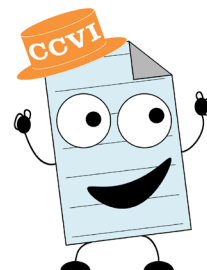
Cell Phone: _____ E-mail: _____

Please feel free to list any additional information that you think may be helpful in the event of contacting an individual about an emergency situation:

Signature: _____

Dated: _____

Consider how much emergency contact information you'll need and if it will be relevant. For instance, you may want e-mail addresses in addition to phone numbers.



Internet, Personal Computers & E-mail Acceptable Use Policy

In my capacity as a volunteer at Volunteer Toronto, I understand that there will be occasions when I will need to access personal computers, shared files, e-mail and the Internet. I understand that it is imperative that I exercise due diligence and caution when working on any of Volunteer Toronto's computers and further understand that all electronic information related to the operation of the organization must remain confidential at all times.

Volunteer Toronto encourages the use of internet to accomplish job responsibilities and further Volunteer Toronto's mission. Volunteer Toronto encourages use of the internet for work related professional contacts and career development.

Volunteer Toronto expects VT staff and volunteers to use internet access in a responsible and informed way.

Volunteer Toronto expects staff and volunteers not to share network or system passwords with anyone.

Use of internet is a privilege, not a right. Volunteer Toronto management may revoke this privilege at any time for unacceptable behavior and abuse of this privilege.

Data integrity must be maintained at all times and any deliberate attempt to sabotage or destroy files will be grounds for immediate dismissal and/or legal action.

I fully understand and agree to abide by the above policies when using Volunteer Toronto's computers, Internet and Email services.

Signature: _____

Name: _____

Date: _____

Witness: _____

Date: _____

Your level of need for a policy of this nature depends on the work of volunteers and the extent to which your computers & databases may contain secure and personal information. If a volunteer won't be using a computer for their volunteer role, then this form won't be necessary.

Incident Report

“Incident” is a circumstance serious enough to require immediate attention to a volunteer, client or staff. Incidents can occur because of a volunteer’s actions, or instead in the presence of a volunteer. This can include breaking boundaries or rules, failing to follow instructions, near-accidents or any occurrence that is problematic.

Date:

Time:

Location:

Name(s) of individual(s) involved:

Details of incident:

Signatures:

Individual(s) _____ Date: _____

Supervisor _____ Date: _____

Accident Report

“Accident” is an unforeseen or unexpected occurrence that could lead to bodily harm or injury and/or damage to property. Accidents are without apparent or deliberate cause and can happen to anyone involved – volunteers, clients, staff and/or community members.

All parties present during an accident – volunteers and/or staff – are required to fill out an accident report form. Use the following format:

Date & Time:

Location:

Report Completed By (& Contact Info):

Names of individual(s) involved:

Nature of Accident:

Medical Emergency / Physical Injury / Property Damage / Assault or Violence / Other

Details of Accident:

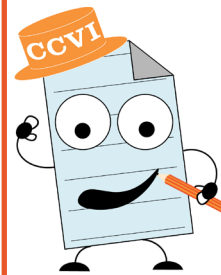
Circumstances Leading to the Accident:

Was there a supervisor present (and who was it?):

Action Taken (by you or another individual):

Who was contacted?:

Signature(s):



Why have two different forms for accident & incident? You want your accident form to be formal for record-keeping purposes in the case of harm or damage, whereas the incident form is more useful to track any instance of an issue, behavioural or otherwise, that does not require immediate attention.

Acceptance of Role & Responsibilities for Volunteers

I fully understand and agree to abide by the policies of Volunteer Toronto as outlined in the Orientation and Training Session and policies and statements provided in this handbook. I further agree to represent Volunteer Toronto in a professional and courteous manner which reflects the organization's key messages and core values. I agree to consult with a Volunteer Toronto staff person should any situation arise during the event which requires clarification, consultation, or appropriate input before making a decision.

Signature: _____

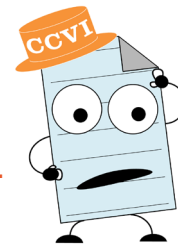
Name: _____

Date: _____

Witness: _____

Date: _____

Volunteers can't legally sign contracts, so having a single sign-off like this allows you get the volunteers written approval of & agreement to the policies and procedures you've laid out in the handbook. This is especially useful as the last page as it can be removed and handed in.



Adding to the Handbook

Over time, it might be important to make changes or additions to your volunteer handbook. These could be full policies from your set of volunteer policies & procedures, or shorter statements, forms or instructional pieces. Adding to the handbook is a useful way to keep your volunteers up to date on important changes. If you print out the handbook for volunteers, you'll want to give them printed additions but also provide them digitally.

Since adding (and especially creating) new policies can be a challenge, here are a few quick pointers to help you in the process:

Your policies should have four to five pieces, as follows:

- Purpose – A short introductory description for the goal of the policy, explaining what having the policy in place will accomplish
- Policy Statement – The rule or standard the policy must communicate; can be short or longer but must get the point across as clearly as possible
- Definitions – If needed, you may need to define terms in the policy or elaborate on language from legislation
- Application & Responsibilities – This details how the policy will be applied and who is responsible for or has responsibilities under the policy
- Procedures – The “action” part of the policy, usually some guidelines or a process as well as forms and templates

Procedures can completely vary, unlike policies which can follow a consistent template. Your procedures should respond to the needs of the policy, both in the application and the process under procedures. In some cases you might need a form or sign-off from volunteers, whereas others could be a detailed process for planning or responding to something in your program. Ensure your procedures:

- Are clearly linked to the policy
- Are adaptable/editable when needed
- Can be accessed by everyone (volunteers & staff)
- Respects the needs of volunteers (it's accessible in language and format)

Volunteer Toronto

Volunteer Handbook Sample Resource Guide & Workbook

Next Steps

To continue your volunteer management journey, there are a number of other workbooks created by Volunteer Toronto to assist you every step of the way:

Basic

- Planning, Recruiting & Selecting
- Training, Supervising & Supporting
- Evaluating, Retaining & Developing
- Engaging Group Volunteers
- Professional Development for Managers of Volunteers

Intermediate

- Planning for Volunteer Involvement
- Volunteer Recruitment
- Volunteer Selection
- Training & Orientation
- Volunteer Retention & Recognition
- Volunteer Supervision

Advanced

- Accessibility and the AODA
- Giving Volunteers Feedback
- Short Term Volunteers
- Long Term Volunteers
- Volunteer Boundaries & Dismissal

Check out our **Online Learning Centre** for a variety of courses to further enhance your learning and improve your practice - go to volunteertoronto.ca/OnlineLearning

This Resource Guide & Workbook has been compiled by the Engaging Organizations Department of Volunteer Toronto, Copyright 2016