

THE
CANADIAN CODE
FOR VOLUNTEER INVOLVEMENT

Values, Guiding Principles and Standards of Practice



VOLUNTEER
BÉNÉVOLES
C A N A D A



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**Canadian Administrators
of Volunteer Resources**

For further information on this subject or
others related to volunteering, please visit: www.volunteer.ca

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In the decade since the Canadian Code for Volunteer Involvement launched to mark the International Year of Volunteers in 2001, thousands of organizations have earnestly adopted and adapted the Code in communities throughout Canada. The enthusiastic reception of the Code by board members, executive directors, managers of volunteer resources, volunteers, staff, funders, and policy makers has brought the Code to life and established it as a flagship document recognized throughout Canada and around the world.

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Volunteer Canada would also like to acknowledge its partnership with Canadian Administrators of Volunteer Resources (CAVR) and all those involved with the 2006 edition, which consolidated the Canadian Code for Volunteer Involvement (Volunteer Canada, 2000) and the CAVR Standards of Practice (CAVR, 2002).

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1 *Background*

VOLUNTEER CANADA

Volunteer Canada encourages all Canadians to get involved in their communities and works with all types of organizations to engage today's volunteers. The organization's expertise is backed by original research, practical knowledge, and its unique network of insight, which includes a broad range of organizations, from individuals to small volunteer centres to national corporations with thousands of staff.

Focused on influencing social policy and developing valuable resources around volunteerism, the organization helps non-profits and businesses by building capacity for the changing culture of volunteerism. It recognizes the impact of Canada's 13.3 million volunteers¹ through national campaigns and works with its Corporate Council on Volunteering to catalyze conversations about corporate citizenship and corporate community involvement. Volunteer Canada works collaboratively across all sectors to support volunteerism and the ultimate agents of social change, Canada's volunteers.

Volunteer Canada works in partnership with:

- a network of more than 200 volunteer centres in communities across Canada;
- associations of provincial/territorial volunteer centres;
- a network of national volunteer-involving organizations that convenes volunteer development professionals working at the national level of Canadian charities, public institutions and non-profit organizations;
- a network of national corporations through its Corporate Council on Volunteering;
- a membership base that represents the full spectrum of the non-profit, public, and private sectors, including managers of volunteers, volunteer centres, non-profit organizations, community groups, government departments, corporations/businesses, and individuals who are interested in volunteerism.
- policy-makers, researchers, and funders in the academic and public sectors



¹ Statistics Canada, "Canada Survey of Giving, Volunteering and Participating", 2010, www.statcan.gc.ca



1 Background

NON-PROFIT SECTOR COLLABORATION

Volunteer Canada works in collaboration with non-profit organizations to provide leadership in strengthening citizen engagement and catalysing voluntary action.

Canadian Administrators of Volunteer Resources (CAVR) is a national organization that advances and strengthens the profession of volunteer resource management. CAVR promotes competence and excellence through an established code of ethics, employment resources and advocacy, certification, and standards of practice with the Canadian Code for Volunteer Involvement. CAVR collaborates with provincial, national, and international organizations to support its membership. It strives for volunteer resource management to be recognized and respected as a leading profession of choice.

The HR Council for the Nonprofit Sector (HR Council) takes action on non-profit labour force issues. Their work is guided by five strategic priorities: to strengthen HR management practices; support skills development and work-related learning; build and share knowledge about the non-profit labour force; promote leadership development and succession planning; and foster a culture of inclusivity. The HR Council has developed HR Management Standards to support board members, managers and employees in the development and implementation of effective HR policies and practices for non-profit organizations.

Imagine Canada is a national charitable organization whose cause is Canada's charities and non-profits. Imagine Canada supports and strengthens charities and non-profits so they can, in turn, support the Canadians and communities they serve. Imagine Canada has developed a Standards Program which offers a set of shared standards designed to strengthen sector capacity in the areas of board governance; financial accountability; fundraising; staff management; and volunteer involvement.

Réseau de l'Action Bénévole du Québec is a non-profit organization focusing its efforts on volunteerism and voluntary action in Quebec. The RABQ has launched a Logo program, which aims to promote volunteerism in Quebec. By displaying the Action Bénévole logo, an organization shows they value and support the involvement of volunteers in advancing their mission.

International Association for Volunteer Effort (IAVE) aims to promote, strengthen and celebrate the development of volunteering worldwide. It is the only international organization for which this is the primary aim. IAVE was founded in 1970 by a group of volunteers from around the world who saw in volunteering a means of making connections across countries and cultures. It has grown into a global network of volunteers, volunteer organizations, national representatives and volunteer centres, with members in over 70 countries, and in all world regions.

Council for Certification in Volunteer Administration (CCVA) advances the profession and practice of volunteer resource management by articulating core competencies for the profession of volunteer administration; certifying individuals who demonstrate knowledge and competence in the leadership of volunteers; advancing standards of ethical practice; and promoting professional development and education.

VOLUNTEERING IN CANADA TODAY

Volunteering is fundamental to a healthy and democratic society; all citizens have a right and a responsibility to contribute in the manner that works for them.

Millions of Canadians² of all ages contribute their time to get involved with people, causes, and organizations they care about. While volunteering continues to grow, there have been significant shifts in the way people want to be engaged.

² CSGVP, 2010

1 Background

People today tend to lead more structured lives, are more results-oriented, autonomous, tech-savvy, and have multiple responsibilities and interests³. The type of volunteer roles Canadians seek evolves throughout the life cycle to reflect changing priorities and circumstances. Volunteers bring their personal talents and interests, professional skills, and education to volunteering in order to respond to needs in their communities. Volunteers seek a range of options and opportunities where they can see the value and impact of their contributions in the community. More people are interested in group volunteering, short-term assignments, and virtual volunteering, and they view volunteering as a way of contributing or gaining skills.⁴

Volunteer Canada has provided leadership in shifting the culture of volunteering to become more inclusive of a wide spectrum of engagement that includes informing oneself about an issue, supporting a cause, participating in community, and providing strategic leadership. Within this inclusive definition of volunteering, short-term micro-volunteering opportunities are considered an effective first step in promoting active citizenship. Skills-based volunteering approaches have been formalized and there has been greater emphasis on how to attract specific groups to volunteering, including youth, families, baby boomers, seniors, and employer-supported volunteers. Newcomers are looking to volunteering as a way to contribute and integrate into their new communities, develop skills, and gain Canadian experience. Corporate community investment strategies have gained momentum over the past decade, and companies are showing a greater interest in integrating volunteering, sponsorships, and corporate donations to have a stronger impact in the community.

Organizations today are considering the motivations and goals of their volunteers as well as the goals of the organization, developing a more reciprocal relationship. In addition to addressing specific needs of the organization, volunteers want the flexibility

to determine the scope of what they can offer. This two-way relationship reflects a more mutual approach to building community.

THE CANADIAN CODE FOR VOLUNTEER INVOLVEMENT: HISTORY, PURPOSE AND ELEMENTS

History of the Canadian Code for Volunteer Involvement

The original Canadian Code for Volunteer Involvement was introduced in December 2000 to launch the International Year of Volunteers (2001). The Code was targeted at boards of directors, volunteer management staff, and volunteers of non-profit organizations. It was intended to promote discussion about the role volunteers play in organizations. Across Canada, many organizations adopted and implemented the Code in their work with volunteers, and in doing so, created a solid base for involving volunteers in their work.

Volunteer Canada and the Canadian Administrators of Volunteer Resources (CAVR) partnered to consolidate the Canadian Code for Volunteer Involvement (Volunteer Canada, 2000) and the CAVR Standards of Practice (CAVR, 2002) as a way of streamlining the ongoing leadership they offer non-profit organizations in the area of volunteer engagement and management. The result was the 2006 revised edition of the Canadian Code for Volunteer Involvement.

To recognize its 10th anniversary, the Code has been updated to reflect the current societal and sectoral context. Revisions take into account the shifting realities of today's volunteers and current volunteer engagement practices.

³Volunteer Canada in partnership with Manulife Financial, Carleton University Centre for Voluntary Sector Research & Development and Harris Decima, "Bridging the Gap, Enriching the Volunteer Experience to Build a Better Future for our Communities", Volunteer Canada, www.volunteer.ca/study

⁴ibid



1 Background

Purpose of the Canadian Code for Volunteer Involvement

By adopting the Canadian Code for Volunteer Involvement, non-profit organizations commit not only to strengthening their volunteer engagement strategy, but also to strengthening the capacity of the organization to meet its mandate and contribute to a stronger community.

The Canadian Code for Volunteer Involvement is designed to initiate thought and discussion within organizations about the role of volunteers and the impact effective volunteer engagement can have on achieving strategic goals and advancing the mission of the organization.

The Code recognizes and reflects the changing realities of volunteer engagement and management practice, and supports the work of those who manage and support volunteer engagement within an organization. It is intended to be flexible enough to apply to a broad range of organizations: small, medium, and large, with different levels of resources, in both rural and urban settings, crossing a range of mandates, led by paid staff or by volunteers. Elements of the Code are designed to be inclusive and can be adapted to apply to a diversity of people, cultures, communities, opportunities, and approaches.

For volunteer engagement to be effective, the organization's leaders must act as champions of a culture and structure that supports and values the role and impact of volunteer involvement.

The Code assists organizations by:

- articulating the values and benefits of volunteer involvement;
- providing a framework for discussion and decision making, taking into account organizational values and guiding principles; and
- promoting standards for involving individuals in meaningful ways to ensure successful integration of volunteers while meeting the needs of both the organization and its volunteers.

Elements of the Code

The Canadian Code for Volunteer Involvement consists of three important elements:

- ***The Value of Volunteer Involvement***
Core statements about the importance and value of volunteer involvement in non-profit organizations and Canadian society
- ***Guiding Principles for Volunteer Involvement***
Principles that detail the relationship between non-profit organizations and volunteers
- ***Organizational Standards for Volunteer Involvement***
Standards that organizations should consider while developing or reviewing how volunteers are involved in their organizations

2 *The Canadian Code for Volunteer Involvement*

THE VALUE OF VOLUNTEER INVOLVEMENT

Volunteer involvement has a powerful impact on Canadian society, communities, organizations, and individuals.

Volunteer involvement is fundamental to a healthy and democratic society in Canada

- It promotes civic engagement and active participation in shaping the society we want
- It gives everyone a voice and the space to contribute to the quality of life in communities

Volunteer involvement is vital for strong, inclusive, and resilient communities

- It promotes change and development through the collective efforts of those who know the community best
- It identifies and supports local strengths and assets to respond to community challenges while strengthening the social fabric

Volunteer involvement builds the capacity of organizations

- It provides organizations with the skills, talents, and perspectives that are essential to their relevance, vitality, and sustainability
- It increases the capacity of organizations to accomplish their goals through programs and services that respond to and are reflective of the unique characteristics of their communities

Volunteer involvement is personal

- It promotes a sense of belonging and general wellbeing
- It provides the opportunity for individuals to engage according to their personal preferences and motivations

Volunteering is about building relationships

- It connects people to the causes they care about, and allows community outcomes and personal goals to be met within a spectrum of engagement
- It creates opportunities for non-profit organizations to accomplish their goals by engaging and involving volunteers, and it allows volunteers an opportunity to engage with and contribute to building community

GUIDING PRINCIPLES FOR VOLUNTEER INVOLVEMENT

Volunteers have rights. Non-profit organizations recognize that volunteers are a vital human resource and will commit to the appropriate infrastructure to support volunteer engagement.

- The organization's practices ensure effective volunteer involvement.
- The organization commits to providing a safe and supportive environment for volunteers.

Volunteers have responsibilities. Volunteers make a commitment and are accountable to the organization.

- Volunteers will act with respect for the cause, the stakeholders, the organization, and the community.
- Volunteers will act responsibly and with integrity.



2 The Canadian Code for Volunteer Involvement

ORGANIZATIONAL STANDARDS FOR VOLUNTEER INVOLVEMENT

The Code is a road map for integrating volunteers strategically into the work of an organization. It helps leaders understand the value and impact volunteer involvement can have in advancing the organization's mission. By adopting the standards outlined below, the organization demonstrates a commitment to engaging and supporting volunteers in a meaningful and responsible way.



Mission-based Approach

The organization's Board of Directors and senior staff acknowledge, articulate, and support the vital role of volunteers in achieving the organization's purpose or mission. Volunteer roles are clearly linked to the organization's mission.



Human Resources

Volunteers are welcomed and treated as valued and integral members of the organization's human resources team. The organization has a planned and integrated approach for volunteer involvement that includes providing appropriate resources to support volunteer involvement.



Policies and Procedures

A policy framework that defines and supports the involvement of volunteers is adopted by the organization.



Volunteer Administration

The organization has a clearly designated individual(s) with appropriate qualifications responsible for supporting volunteer involvement.



Risk Management and Quality Assurance

Risk management procedures are in place to assess, manage, or mitigate potential risks to the volunteers, the organization and its clients, members and participants that may result from the delivery of a volunteer-led program or service. Each volunteer role is assessed for level of risk as part of the screening process.



Volunteer Roles

Volunteer roles contribute to the mission or purpose of the organization and clearly identify the abilities needed. Volunteer roles involve volunteers in meaningful ways that reflect their skills, needs, interests, and backgrounds.



Recruitment

Volunteer recruitment incorporates a broad range of internal and external strategies to reach out to diverse sources of volunteers.

2 The Canadian Code for Volunteer Involvement



Screening

A clearly communicated and transparent screening process, which is aligned with the risk management approach, is adopted and consistently applied across the organization. See 10 Steps of Screening.



Orientation and Training

Volunteers receive an orientation to the organization, its policies, and practices, appropriate to each role. Each volunteer receives training specific to the volunteer role and the needs of the individual volunteer.



Support and Supervision

Volunteers receive the level of support and supervision required for the role and are provided with regular opportunities to give and receive feedback.



Records Management

Standardized documentation and records management practices and procedures are followed and are in line with current relevant legislation.



Technology

Volunteers are engaged and supported within the organization through the integration and intentional use of current technology. New opportunities to strengthen volunteer engagement and capacity through the use of technology are evaluated continually.



Recognition

The contributions of volunteers are acknowledged by the organization with ongoing formal and informal methods of recognition, applicable to the volunteer role. The value and impact of volunteer contributions are understood and acknowledged within the organization and communicated to the volunteer.



Evaluation

An evaluation framework is in place to assess the performance of volunteers and gauge volunteer satisfaction. The effectiveness of the volunteer engagement strategy in meeting the organization's mandate is also evaluated.



3 *Involving Volunteers: Adopting and Implementing the Code*

HOW TO ADOPT THE CODE IN YOUR ORGANIZATION

By adopting the Canadian Code for Volunteer Involvement, non-profit organizations commit not only to strengthen their volunteer engagement strategy, but to strengthen the capacity of the organization to meet its mandate and contribute to a stronger community.

The following are suggested steps for your organization to follow in adopting and implementing the Code. Organizations can work toward achieving the standards in ways that are appropriate to them. If your organization has already adopted a previous version of the Code, some of the steps may not be necessary. Periodic review of the Code will also help embed the values, guiding principles, and standards into those of the organization, so that effective volunteer involvement becomes part of the organizational culture.

The following steps are suggested to help organizations move toward adopting and implementing the Code:

- Review the Code with leadership to ensure that the organization is aligned with the Values and Guiding Principles sections
- Present the Code to the board of directors and make a formal motion for the organization to adopt the Code
- Prepare and display a statement related to volunteer involvement
- Assess the organization's practices related to the Values, Guiding Principles and Standards and share the results with the board of directors to support the case for adopting the Code. The Audit Tool may be helpful to your organization during this assessment. Conducting an assessment after adopting the Code provides the opportunity to inform the board of directors of the organization's progress in achieving the standards, and reinforces the board's commitment to the Code.
- Develop a work plan to address specific areas identified in the organizational assessment. The Audit Tool may be a helpful resource.
- Your local volunteer centre, provincial association of volunteer centres, or Volunteer Canada may be a good resource to assist in the process of adopting the Code or for information on implementing the Code.
- Advise Volunteer Canada when the organization has adopted the Code and is working toward implementing the standards, to be listed as a Code adopter on Volunteer Canada's website.
- Review the Code periodically to mark your organization's progress and identify opportunities for improvement.

3 Involving Volunteers: Adopting and Implementing the Code

INVOLVING VOLUNTEERS IN NON-PROFIT ORGANIZATIONS

“Engaging community in the work of any organization requires a culture that believes talent, from whatever source, is critical to the success of the organization or cause. That means boards of directors and paid staff have to be intentional and deliberate in enabling and modelling the engagement of others in delivering on the mission of their organization.”⁵

Non-profit organizations accomplish their goals through their human resources. By using a planned approach to identify the work functions (both paid and unpaid) needed to achieve their missions, organizations are able to engage the talents and skills of people and increase their organizational capacity through targeted recruitment. Part of the Code’s strategy is to ensure that the skills needed to effectively engage volunteers become a core competency of most or all staff members. It is also important that the Board and Executive Director, and senior staff champion a culture and structure that supports and values the role and impact of volunteer involvement.

Everyone within a non-profit organization has a role to play in ensuring successful and effective volunteer involvement. Too often, the management or oversight of volunteers is left to a single individual⁶ within the organization. Adopting a more inclusive approach to human resource management that considers both volunteers and paid staff ensures volunteers have more entry points into an organization.

The table on the next page illustrates key roles, responsibilities, and accountabilities within a non-profit organization. It can be adapted to reflect the specific titles and roles that exist in any organization. For larger, more complex organizations, a column identifying the roles, responsibilities, and accountabilities of staff working directly with volunteers might be appropriate. For grassroots organizations, some of the columns might merge, as individuals working for smaller organizations often undertake multiple roles. It is important to recognize that each organization is unique; this table is intended as a frame of reference for defining individual responsibilities. It allows non-profits to determine who in the organization is accountable for ensuring that volunteers are effectively involved and able to contribute to the mission and programs of the organization.

⁵ Martha Parker, “Rethinking Volunteerism – Should it be a Priority?”, *The Philanthropist*, Volume 24 • 2 (2011): 131

⁶ or department, if applicable



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	BOARD MEMBERS	EXECUTIVE DIRECTORS OR LEADERSHIP VOLUNTEERS	MANAGERS OF VOLUNTEER RESOURCES (PAID OR VOLUNTEER) AND/OR MANAGER OF HUMAN RESOURCES	STAFF	VOLUNTEERS
SPECIFIC ROLES IN ORGANIZATION	Create, lead, and ensure a supportive environment and culture for volunteer involvement (Policy Focus)	Create and lead a supportive environment and culture for volunteer involvement (Policy and Delivery Focus)	Create and manage a supportive environment and culture for volunteer involvement (Policy and Delivery Focus)	Individually contribute to support an environment and culture for volunteer involvement. (Delivery Focus)	Individually contribute to support an environment and culture for volunteer involvement. (Delivery Focus)
VISION, MISSION, VALUES, AND STRATEGIC PLAN	<ul style="list-style-type: none"> Define and review vision, mission, and values around volunteer involvement Develop a strategic plan that considers integrating volunteer involvement as a core function and resource to support achievement of the mission 	<ul style="list-style-type: none"> Review vision, mission, and values Assist with strategic plan development Develop and manage operational strategies and goals and the annual plan 	<ul style="list-style-type: none"> Link operational work to vision, mission, and values Manage annual operating goals and strategies 	Understand how volunteer roles link to vision, mission, and values	<ul style="list-style-type: none"> Understand how volunteer role links to vision, mission, and values Undertake volunteer role to achieve operational goals and strategies
GOVERNANCE POLICY	Identify and develop governance policies	Manage to support governance policies	Manage to support governance policies	Follow policies	Follow policies
PROGRAMS AND OPERATIONS	Develop policies for programs and operations	Identify and obtain the resources (human and financial) required for programs and operations to be delivered	Manage the volunteer / human resources so that programs and operations are supported	Provide support to volunteer service and leadership for effective program delivery	Provide volunteer service and leadership for effective program delivery
HUMAN RESOURCES MANAGEMENT (VOLUNTEER INVOLVEMENT)	Develop a policy approach to human resource management and incorporate the volunteer involvement standards	<ul style="list-style-type: none"> Ensure effective management of human resource strategies in the organization Lead the involvement of volunteers and the integration of volunteer involvement standards and practices 	<ul style="list-style-type: none"> Ensure consistent application of human resource management strategies to volunteer resources Ensure volunteer involvement standards are consistently applied within the organization 	Operate within and support the volunteer involvement standards for development, delivery, and support of quality programs and/or services.	Operate within and support the volunteer involvement standards for development and delivery of quality programs and/or services.

3 Involving Volunteers: Adopting and Implementing the Code

ORGANIZATIONAL STANDARDS CHECKLIST

By adopting the standards outlined in this resource, an organization demonstrates its commitment to involving volunteers in the work it does to achieve its mandate. By implementing the detailed practices outlined for each standard, organizations send a strong message to volunteers, staff, stakeholders, funders, and the community that volunteers are integral to achieving the organization's mission.

The organizational standards are intended to be flexible enough to apply to non-profits from coast to coast, of all sizes and levels of resources, urban or rural, with paid staff or led by volunteers, with a broad range of mandates and missions. They are designed to be inclusive and can be adapted to apply to a diversity of people, cultures, communities, opportunities, and approaches. Each organization will have to consider how to adopt the standards according to their circumstance, while still achieving the overall intent of the Code.

'The Code in Action': is a complementary online resource that provides practical examples of how organizations are using the Code every day in their relationships with volunteers. Organizations reflect on the Values, Guiding Principles, and Organizational Standards outlined in the Code. Examples are drawn from a broad cross-section of organizations.

The Audit Tool: Organizations can use the Audit Tool to analyze their volunteer resource management practices and to identify and prioritize areas for development. The Audit Tool can be used as part of a process to formally adopt the Canadian Code for Volunteer Involvement. It includes checklists with detailed practices for each section of the Code: Value of Volunteer Involvement, Guiding Principles and each of the standards.

STANDARD 1 MISSION-BASED APPROACH

Volunteer involvement helps the organization achieve its mission and objectives. Volunteer involvement must be aligned with the organization's goals and resource allocations. The board and senior management understand, support, and approve the direction of the volunteer engagement strategy.

- The board of directors, leadership volunteers, and staff acknowledge, articulate, and support the vital role of volunteers in achieving the organization's purpose and mission.
- The board of directors adopts a statement declaring the vital role of volunteers in achieving the organization's mission.
- The organization's planning process incorporates volunteer involvement.
- The board has approved the overall strategy for volunteer involvement.
- A budget is allocated for volunteer involvement.
- Adequate space and equipment are allocated for volunteers to perform their roles.
- Appropriate insurance is acquired to address volunteer and organizational liability.
- Volunteer involvement goals are assessed regularly by the board of directors.
- Volunteer roles are clearly linked to the organization's mission.



3 Involving Volunteers: Adopting and Implementing the Code

STANDARD 2 HUMAN RESOURCES

A healthy organization empowers volunteers and strengthens volunteer engagement. Volunteers are supported and encouraged to become involved and contribute in new ways beyond their initial roles. Volunteers are included as equal members of the team. The definition of 'team' should not be limited to those within the organization who are paid. Involved and informed volunteers who feel part of the organization are far more likely to continue contributing their valuable time and skills.

Volunteers are welcomed and treated as valued and integral members of the organization's human resources team, regardless of whether their assignments are performed on site or remotely, as is the case for virtual volunteering opportunities. The organization has a planned approach for volunteer involvement that includes linking volunteer roles to the achievement of the mission, providing the appropriate human and financial resources to support volunteer involvement, and establishing policies for effective management.

- Individuals are engaged according to their abilities, skills and talents as part of a 'one workforce' approach, whether they are paid or unpaid.
- Staff are given training and support to engage and work effectively with volunteers.
- Input from volunteers is welcomed and solicited for the organization's planning and evaluation.
- Volunteers are encouraged to develop within the organization.
- Volunteers are included as equal members of the team.

STANDARD 3 POLICIES AND PROCEDURES

Policies and procedures help clarify responsibilities and ensure consistency. They should be developed and documented on a broad spectrum, from volunteer roles and screening, to grounds for dismissal. The organization's board of directors needs to ensure volunteer policies are congruent with other policies within the organization. The manager of volunteer resources is responsible for identifying any specific policies and procedures required. These policies should be reviewed regularly to ensure they align with current trends in volunteer involvement, such as virtual volunteering, social media, recruitment strategies, etc.

- A policy framework that defines and supports the involvement of volunteers is adopted by the organization.
- Policies and procedures are adopted by the organization to provide a framework that defines and supports the involvement of volunteers.
- The organization's planning process incorporates volunteer involvement.
- The board has approved the overall goals for volunteer involvement.
- Governance and operational policies are in place, reviewed regularly, and incorporate current volunteer engagement trends and best practices.
- Policies and procedures are communicated to all staff and volunteers.
- Policies and procedures are followed consistently and equitably.
- Program policies enhance the experience of a diversity of volunteers.
- Policies and procedures are consistent with national and provincial/territorial Human Rights Codes, The Freedom of Information and Protection of Privacy Act, and provincial/territorial employment standards legislation.

3 Involving Volunteers: Adopting and Implementing the Code

STANDARD 4 VOLUNTEER ADMINISTRATION

Managing volunteers is both an art and a science. The job is highly complex and demands a wide range of skills. Regardless of whether they are paid staff members or volunteers, managers of volunteer resources should have the necessary skills, experience, and support to do the job well.

- The organization has a clearly designated individual(s) with appropriate qualifications responsible for volunteer involvement.
- The designated person has an appropriate level of education and experience to support volunteer involvement.
- A written job description is developed for the designated role and reviewed regularly.
- The designated person is a member of the management or administrative team or a key leadership volunteer.
- The designated person works collaboratively with staff, the local volunteer centre, and other organizations to ensure the effectiveness of the volunteer engagement strategy.
- The designated person works with all staff in their roles to support and enable volunteer involvement.
- Professional development opportunities are provided on a regular basis for all individuals responsible for volunteer engagement.
- The performance of the designated person is reviewed regularly and includes feedback from both staff and volunteers.

STANDARD 5 RISK MANAGEMENT AND QUALITY ASSURANCE

Volunteer involvement requires that organizational staff identify, assess, and appropriately manage potential risks to the organization and its clients, members, participants, and volunteers that may result from the delivery of a volunteer-led program or service.

A risk management audit for all volunteer roles is integral. Audits are based on the role, not the individual volunteer. Staff will determine appropriate procedures and processes to assure quality program standards are achieved. In some organizations, the risk management and quality assurance program is formalized to achieve accreditation.

- All volunteer activities are assessed for risk factors.
- Procedures and processes are identified to manage or mitigate the risk factors associated with volunteer activities.
- Volunteers are fully informed of the potential for risk and are trained to manage or mitigate the risk factors.
- Opportunities exist for volunteers to give feedback to the organization about risk factors.



3 Involving Volunteers: Adopting and Implementing the Code

STANDARD 6 VOLUNTEER ROLES

Roles should be developed to address the needs of the organization and the volunteer. Volunteer roles should be linked to the organization's mission. Individual needs vary considerably; therefore, successful volunteer engagement adapts volunteer roles to fit these motivating factors when possible. It is necessary to periodically review volunteer roles to ensure their relevance and value to the organization's mission and to the volunteer's needs and motivations.

- Volunteer roles contribute to the mission or purpose of the organization and involve volunteers in meaningful ways that reflect the skills, interests, needs, and background of the individual.
- Volunteers and staff (including bargaining units of unions, where applicable) are consulted when developing new roles.
- Volunteer roles have written descriptions that include duties, responsibilities, skills needed, time required, and benefits to the volunteer, the organization, and the community.
- Volunteer roles are developed to reflect the needs of the organization and the needs of volunteers, incorporating a range of approaches and reflecting current trends. Volunteer roles may be developed by the organization or by the volunteer.
- Volunteer roles are reviewed periodically with staff, volunteers (and bargaining units of unions, where applicable) to ensure relevance and value.
- The level of risk is assessed and minimized for all volunteer roles.

STANDARD 7 RECRUITMENT

Effective recruitment messages are realistic and clear. They convey an accurate impression of the organization, its needs, and available opportunities. Genuine effort should be made to recruit and select volunteers with a broad range of backgrounds and experience, using a range of approaches. A healthy organization reaches out to diverse sources of volunteers, reflecting the diversity of the community.

- Volunteer recruitment incorporates internal and external strategies to reach out to diverse sources of volunteers.
- Recruitment messages are realistic and clear about the volunteer roles and expectations.
- Various techniques are used to recruit volunteers including making use of current technology-based and social media tools.
- Recruitment strategies are broad-based and accessible.
- Recruitment messages may invite volunteers to discuss their skills and interests.
- Recruitment messages indicate that screening procedures are followed in the organization and list the specific verification processes required for each position.
- Genuine effort is made to recruit and select volunteers from a broad range of backgrounds and experiences to reflect the diversity of the community.
- Selection of volunteers is based on requirements of the role and pre-determined screening measures.

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STANDARD 8 SCREENING

Screening is an essential process undertaken for the duration of a volunteer's involvement with the organization. Screening procedures apply to all volunteer roles with no exceptions and are based on the risk of the activities involved with each role; individuals do not determine screening. Screening should be viewed as evidence that the organization cares about its programs and its people.

- A clearly communicated and transparent screening process, which is aligned with the risk management approach, is adopted and consistently applied by the organization. (See Volunteer Canada's Ten Steps of Screening).
- Screening is considered to be an essential process that continues throughout the volunteer's involvement with the organization.
- Policies relating to screening practices are developed, adopted, and clearly communicated to staff and volunteers. All screening practices are updated to reflect current standards and applicable legislation.
- Diverse screening strategies and tools are used.
- All volunteer roles are assessed for level of risk. The assessment is based on the role, not the individual in the role.
- Appropriate screening tools are used according to the level of risk of the role.
- Once defined, screening practices are applied consistently with no exceptions.

STANDARD 9 ORIENTATION AND TRAINING

An orientation clarifies the relationship between volunteers and the organization. It familiarizes volunteers with the organization by providing information on the policies and procedures that influence their work and their involvement with others. Volunteers need adequate training to perform their roles without putting themselves or others at risk. Training prepares volunteers to do the work required by the role and to meet the expectations of their volunteer roles.

- Each volunteer is provided with an orientation to the organization, including its policies and practices.
- Each volunteer receives training specific to the role and the individual needs of the volunteer.
- Volunteers receive information on the history, mission, and structure of the organization.
- Volunteers receive information on the policies and procedures specific to their role.
- Volunteers are given adequate training to perform their role without putting themselves or others at risk.
- Volunteers are informed of the boundaries and limits of their roles.
- Volunteers have ongoing training opportunities to upgrade their skills and adapt to changes in the organization.
- Training is provided in a diversity of formats to ensure accessibility.



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STANDARD 10 SUPPORT AND SUPERVISION

Prior to the placement of volunteers in their roles, the level of support or supervision required should be determined based on the complexity and risk of the role. Where applicable, each volunteer should know their supervisor. Supervision increases the motivation of volunteers, helps ensure the organization's mandate is met, and gives volunteers a sense of belonging within the organization.

- Volunteers receive a level of support or supervision appropriate to the role and are given regular opportunities to offer and receive feedback.
- The complexity and risk of each role determines the level of support or supervision.
- Volunteers are matched to their role and introduced to their support or supervisors at the start of their involvement.
- The performance of volunteers is reviewed on a regular basis.
- Random spot checks with volunteers (and clients) are used to assess volunteer performance, if appropriate.
- Volunteers are given and encouraged to use mechanisms for providing input to the organization.
- Support and supervisory formats, processes, and tools are accessible, unbiased, and inclusive.
- Situations requiring reprimand and dismissal follow policies and procedures fairly and consistently, while respecting the safety and dignity of all concerned.

STANDARD 11 RECORDS MANAGEMENT

Records should be maintained on every volunteer involved with the organization using a confidential, secure system. Records should include application forms, records of interviews, role descriptions, letters of reference, performance appraisals, and current contact information. Records are also useful in evaluating the impact of volunteer involvement.

- Standardized documentation and records management practices are followed and in line with current relevant legislation.
- Records are kept for each volunteer using a confidential, secure system respecting the privacy of personal information whether in electronic or hard copy format.
- Statistical information about volunteer engagement is regularly shared with staff and volunteers in the organization.
- With appropriate agreement, testimonials about volunteer involvement are shared within the organization to promote volunteer involvement.
- The organization keeps informed of current legislation, Human Rights Codes, and other relevant guidelines for records management, privacy, access to information, and confidentiality practices.

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STANDARD 12 **TECHNOLOGY**

Technology facilitates access to organizational and program information and provides new opportunities for recruitment, orientation, training, and both internal and external communication.

- Volunteers are engaged and supported within the organization through the integration and intentional use of current technology.
- New opportunities for building volunteer capacity through the use of technology are evaluated continually.
- Information for recruitment, intake, communication, and support is made available to volunteers through online technology, pending capacity and resources.
- The organization undertakes a regular review of available technology to determine what could benefit volunteers and support effective volunteer engagement within the organization.

STANDARD 13 **RECOGNITION**

Effective volunteer resource management acknowledges the contributions of volunteers using ongoing formal and informal methods of recognition that are appropriate and meaningful to the individual volunteer. In addition, it is essential that those responsible acknowledge internally and publicly (where appropriate) the importance and impact of volunteer involvement to the organization.

- The contributions of volunteers are consistently acknowledged with ongoing formal and informal methods of recognition. The value and impact of volunteer contributions are understood and acknowledged, and communicated to the volunteer.
- Senior management acknowledges the involvement and impact of volunteers.
- Formal methods of recognition are delivered consistently.
- Informal methods of recognition are delivered in a timely and appropriate manner.
- Recognition is appropriate to the volunteer role and arrangement, and respects cultural values and perspectives.



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STANDARD 14 **EVALUATION**

An evaluation framework is in place to assess the performance of volunteers and gauge volunteer satisfaction. The volunteer engagement strategy should be evaluated regularly to ensure the involvement of volunteers contributes to the organization's mandate. An evaluation of the volunteer engagement strategy should include: reviewing goals and objectives, identifying results achieved, obtaining feedback from current volunteers and clients, and collecting and reviewing both quantitative and qualitative data about volunteer involvement.

- The impact of the volunteer engagement strategy is evaluated to ensure the needs of the organization are met. In addition, volunteer involvement should be evaluated to ensure the needs and goals of the volunteers are met.
- Performance goals are established annually for the volunteer engagement strategy.
- The achievement of performance goals is assessed on an annual basis.
- The volunteer engagement strategy is evaluated regularly by the board of directors to ensure it serves the organization's mission.
- Volunteers are able to give feedback to the organization about their involvement.
- The performance of individual volunteers is assessed regularly.
- Proper mechanisms for assessing volunteer satisfaction are in place.



Appendix A

VOLUNTEERS AND THE NON-PROFIT SECTOR IN CANADA

At the core of every community you will find groups of people working together to enrich quality of life, stand up for their values, and protect the environment in which they live. These groups, large and small, formal and informal, are the organizations that serve as the catalysts for citizen engagement. They are a crucial voice in public policy dialogue, and they drive social innovation.

Volunteerism and the non-profit sector continue to be core elements of Canadian society. Canadians are generous with their time, collectively contributing more than two billion hours to volunteering annually. Every day, thousands of people voluntarily share their time, talents, and skills through tens of thousands of organizations across Canada. They give their time freely and with no expectation of monetary benefit from the causes they support. Their efforts lead and support a broad range of programs, services, and activities that respond to specific needs in their communities, whether these are defined geographically or as communities of common interest.

Canadians from diverse cultures and backgrounds, in urban centres and in rural communities, volunteer informally (giving back directly) and through more than 161,000 non-profit organizations in areas as diverse as health care, social services, sports and recreation, faith communities, arts and culture, education, the environment, and information technology. Some of these organizations are large and structured with staff and volunteers who work collaboratively. Many more are smaller grassroots organizations or community groups run solely by volunteers or with very limited paid staff support.

Non-profit organizations have always provided significant social, health, cultural, recreational, religious, and educational services that have a positive impact on the quality of life in our communities. In recent years, the non-profit sector has been under increasing stress in the face of societal and organizational changes. Economic downturns, increasing downloading of services, an aging population, and increased use of technology have all affected the sector's ability and capacity to effectively respond to complex community needs. Many organizations are struggling to meet growing demand for their services while responding to pressure to be more accountable for their program outcomes and risk management practices.



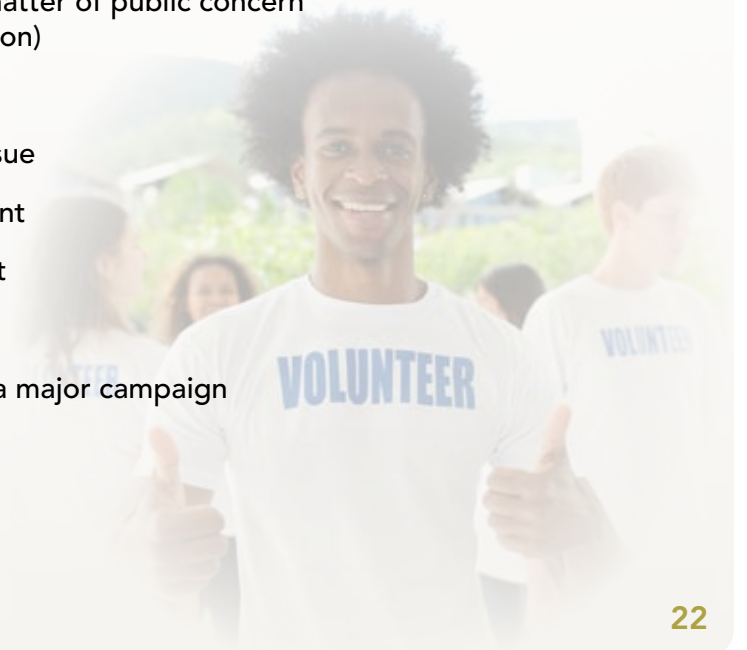
Appendix B

SPECTRUM OF VOLUNTEER ENGAGEMENT: a continuum that includes informing oneself about an issue, supporting a cause, actively participating, and adopting leadership roles. These range from the most passive to the most active levels of engagement.



EXAMPLES WITHIN THE SPECTRUM OF VOLUNTEER ENGAGEMENT

- ▶ Informing yourself about an issue by reading a blog or posting
- ▶ Helping to raise awareness about an issue (circulating/posting material yourself)
- ▶ Creating / contributing to momentum about a matter of public concern (creating a petition or signing/circulating a petition)
- ▶ Participating in chats/e-forum on an issue
- ▶ Organizing/initiating a chat/e-forum about an issue
- ▶ Volunteering for an organization at a special event
- ▶ Volunteering on a short-term project/assignment
- ▶ Volunteering on a regular basis
- ▶ Being on a board of an organization or chairing a major campaign



Appendix C

GLOSSARY OF TERMS

BOARD

Those persons responsible for providing leadership and direction to the organization and tasked with governing the organization's affairs on behalf of its members. For the purpose of this document, the term "board" refers to a board of directors, members of the executive, board of governors, or a board of trustees, administrators, clergy, leaders, coaches, coordinators, officials, parents, participants or anyone else involved in the governance or decision making of the organization.

CAPACITY

The human and financial resources, technology, skills, knowledge, and understanding required for organizations to do their work and fulfill the expectations of stakeholders.

ACTIVE CITIZENSHIP

Citizens who actively participate in their communities by tackling problems or bringing about change with the aim of improving quality of life.

CULTURE

The way a group of people engages with one another. It refers to the shared language, values, traditions, norms, customs, arts, history, or institutions of a group of people.

DIVERSITY

A broad term that refers to the differences among individuals and groups, including difference in age, culture, faith, ethnicity, gender, sexual orientation, and ability.

EMPLOYER SUPPORTED VOLUNTEERING

Employees who volunteer in their community with some form of support and/or encouragement from their employer.

EXECUTIVE DIRECTOR (ED) OR CHIEF EXECUTIVE OFFICER (CEO) OR PRESIDENT

The most senior staff position in the organization. The ED is responsible for the entire organization and reports directly to the board. The ED's role is to support the governance of the board while ensuring that programs and operations of the organization are delivered.

FAMILY VOLUNTEERING

Family volunteering involves more than one person in a household or extended family, from different generations, volunteering together. The term family refers to any group of two or more people who consider or define themselves as family.

INTEGRATED HUMAN RESOURCES APPROACH

A strategically planned approach to identifying the work functions that need to be accomplished in organizations. It involves engaging people, whether paid or unpaid, to perform the work needed to achieve the organization's mission. (Volunteer Calgary)

LEADERSHIP VOLUNTEERS

Individuals who are mainly responsible for supporting the governance of the board while ensuring that programs and operations of the organization are delivered.

MANAGER OF VOLUNTEER RESOURCES

An administrator of volunteer resources is a professional who applies best practices in volunteer management in compliance with nationally accepted standards to identify, strengthen, and effectively maximize voluntary involvement for the purpose of improving the quality of life of individuals and communities. The term "administrator" is used in a generic way to represent all other titles used in the non-profit sector (director, coordinator, manager, leader, etc). In some organizations, the title of the person responsible for managing volunteer resources may not even reflect this role. Throughout the Code, the term "Manager of Volunteer Resources" is used. (CAVR definition)



Appendix C

MICRO-VOLUNTEERING

Micro-volunteering describes a task done by a volunteer, or team of volunteers, usually online via an Internet-connected device, including smart phones. Micro-volunteering is a form of virtual volunteering. It typically does not require an application process, screening, or training period, takes only minutes or a few hours to complete, and does not require an ongoing commitment by the volunteer.

MISSION

The reason for an organization's existence. The overall goal of the organization, this is often referred to as its "raison d'être".

ORGANIZATIONAL STANDARDS

Standards that organizations should consider in developing or reviewing how they involve volunteers. This is a basic set of standards to which all organizations should aspire.

NON-PROFIT ORGANIZATIONS

Self-governing organizations that exist to serve the public benefit, generate social capital but do not distribute private profit to members, depend to a meaningful degree on volunteers, involve participation on a voluntary basis, and are independent or institutionally distinct from the formal structures of government and the profit sector. A non-profit organization can be a large, structured organization or a small, community or grassroots organization.

POLICIES

Specific statements of belief, principle, or action that tell us what to do. (Principles or rules to guide decisions and achieve outcomes.)

PROCEDURES

A series of steps to help implement policy. The steps indicate who will do the work and how it will be done.

SKILLS-BASED VOLUNTEERING

Leveraging the specialized skills and talents of individuals to help build and sustain the capacity of organizations to successfully achieve their missions.

SPECTRUM OF ENGAGEMENT

A continuum that includes being informed about an issue, being supportive of a cause, actively participating, to taking leadership. These run from the most passive to the most active levels of engagement.

STAFF

Individuals who work on behalf of an organization, whether paid or unpaid.

VIRTUAL VOLUNTEERING

A volunteer who completes tasks, in whole or in part, off-site from the organization using the Internet and a computer or other Internet-connected device. Virtual volunteering is also known as online volunteering, cyber service, telementoring and teletutoring.

VOLUNTEERISM

Refers to the concept of contribution of time, resources, energy and/or skills given of one's own free will, without monetary compensation.

VOLUNTEERING

The most fundamental act of citizenship and philanthropy in our society. It is the offering of time, energy and skills of one's own free will.

VOLUNTEER

Any person who gives freely of their time, energy and skills for public benefit, of their own free will, without monetary compensation.

VOLUNTEER RESOURCE MANAGEMENT

The practice and profession of leading teams of individuals (volunteers) to support and enhance the programs and services of an organization. This is a component of human resource management and should be closely aligned and/or integrated with it.

Appendix D

ADDITIONAL RESOURCES

INTERNATIONAL ASSOCIATION FOR VOLUNTEER EFFORT: DECLARATION ON VOLUNTEERING

In the 2011 Global Volunteer Conference final declaration, delegates called on all sectors of society to make volunteering a priority, and recognize the contribution of volunteers in making the world a better place.

<http://www.iave.org/content/global-volunteer-conference-budapest>

FEDERAL AND PROVINCIAL HUMAN RIGHTS CODES, FEDERAL AND PROVINCIAL PRIVACY LEGISLATION

The engagement of volunteers is governed by the Canadian Human Rights Code and provincial human rights codes, as well as federal and provincial privacy legislation. Non-profit organizations should be aware of the content of these codes and should ensure their volunteer engagement practices comply with the regulations identified in them.

VOLUNTEER CANADA'S VOLUNTEER RESOURCE CENTRE

Volunteer Canada's website is a hub for resources on a wide range of topics related to volunteerism that can be accessed and ordered online through:

www.volunteer.ca/topics-and-resources

VOLUNTEER CANADA'S 10 STEPS OF SCREENING

Volunteer Canada developed a variety of resources to assist organizations in assessing and managing risk in their volunteer engagement programs. These resources can be accessed at:

www.volunteer.ca/screening

CANADIAN ADMINISTRATORS OF VOLUNTEER RESOURCES (CAVR)

www.cavrcanada.org/

VOLUNTEER CANADA'S BRIDGING THE GAP: ENRICHING THE VOLUNTEER EXPERIENCE TO BUILD A BETTER FUTURE FOR OUR COMMUNITIES

This 2010 report shares practical information for use by non-profit organizations to attract and retain skilled, dedicated volunteers among four specific demographic groups: youth, families, baby boomers and employer-supported volunteers. To view the report and related resources, see:

www.volunteer.ca/study

A GUIDE FOR CULTURAL COMPETENCY APPLICATION OF THE CANADIAN CODE

The Guide is designed to assist managers of volunteers in incorporating a cultural competency perspective in their application of the Code. Developed by the Ontario Volunteer Centre Network and the Ontario Ministry of Citizenship and Immigration, 2009

www.volunteer.ca/topics-and-resources/volunteer-management/resources

VOLUNTEER CANADA'S SKILLS-BASED VOLUNTEERING DISCUSSION PAPER

More organizations are working to create programs that attract and retain skilled volunteers in a more explicit and sustainable way. This paper provides a framework for discussion of emerging trends and expectations of volunteers, provides examples of good practice, and sets guidelines for organizations to develop tools and resources for engaging skills based volunteers.

www.volunteer.ca/skills

CANADA SURVEY OF GIVING, VOLUNTEERING AND PARTICIPATING

www.givingandvolunteering.ca

NATIONAL SURVEY OF NON-PROFIT AND VOLUNTARY ORGANIZATIONS

www.library.imaginecanada.ca/files/nonprofitscan/en/nsnvo/nsnvo_report_english.pdf



