



# Canadian Journal of Volunteer Resources Management

Issue 21.3

RISKS AND DEMANDS

2013

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Letters commenting on articles are welcome, but may be edited for brevity and clarity.

The innate reward of working in volunteer resource management is the ability to connect with people from all walks of life. Unfortunately, by our very nature, people are incredibly risky. We sometimes behave in unpredictable ways, especially when faced with adversity or unforeseen circumstances. This issue of the Journal explores the theme of risks and demands. Our authors consider the difficult task of balancing program demands and initiatives with various potential liabilities.

We lead our issue with an article by Suzanne Liddle who outlines risk management as it relates to Meals on Wheels in Vancouver. She posits that strong communication is the best way to ensure volunteers are well trained, effectively managed and most able to assist homebound clients.

In their respective articles, Brian Cole and Graham Pawlett examine the work of volunteers in the context of disaster relief and firefighting. Their pieces each highlight the vital elements involved in protecting individuals who are inherently at risk due to volunteering during emergency situations.

Elva Keip explores practical strategies for volunteers on a board of directors. Her discussion of considerations relating to the legality and accountability of such positions is a must read for any current or prospective board member.

An important theme that runs through the issue is that of risk management for hard-to-fill volunteer positions. Evelynn Ogwang shares the challenges of her work in a violence against women shelter. In “CoSA Volunteers – How to Get Them and Keep Them,” Adina Ilea relates the rewarding yet difficult work of supporting clients who have served a prison sentence for a sexual offence. Another article explores the assessment of the emotional suitability of volunteers who work on crisis and distress lines. Ruth Pentinga’s submission highlights the benefits and concerns of working with individuals mandated to do their volunteer work by a court sentence.

Finally, in our Peer Expert Response column, Rachel Stoparczyk looks at the difficult task of evaluating the nature of convictions on a criminal records check.

While we can never completely remove the existence of risk from the workplace, our careful consideration of the issue helps us ensure the protection and well-being of our clients, volunteers and organizations.

*Arianne Richeson, Editorial Team*

## Risks and Perceived Risks of Being a Meals on Wheels Volunteer

by Suzanne Liddle

Health and Home Care Society of BC (Care BC) has been delivering Meals on Wheels in Vancouver and Richmond since 1967. A Chinese Meals on Wheels Program has also been operating since 1996 to cater to an increasing population of Chinese seniors.

Care BC's programs focus on supporting seniors, caregivers and other people at risk of isolation: we deliver approximately 500 meals with the support of an average of 60 volunteers per day. Running a large volunteer program (we currently have a team of over 330 volunteers) working with a vulnerable population carries a number of inherent risks.

To control and minimize risk, the program has undergone a process of risk assessment. This process is vital as it helps to protect clients, volunteers and the organization itself from potential harm. Risk assessment is also an important component in showing that volunteers are valued; it is much more than simple health and safety. For the purposes of this article I will discuss a selection of identified risks involved in the Meals on Wheels Program.

*To control and minimize risk, the program has undergone a process of risk assessment. This process is vital as it helps to protect clients, volunteers and the organization itself from potential harm.*

### Risk to the client:

#### Reliance on volunteers to deliver meals

The structure of any Meals on Wheels program is that it is completely reliant on volunteers to ensure that food gets delivered to clients each day. This in itself creates the risk of non-

delivery if a volunteer forgets, cancels at the last minute or does not show up. For this reason volunteers are asked to provide as much notice as possible if they need time off. A list of spare volunteers is in place for last-minute cancellations and staff can deliver if necessary to ensure that clients always receive their food.

#### Volunteer access to vulnerable clients

Volunteers need to know names, addresses and sometimes other information pertinent to delivering meals. For this reason, it is vital that volunteers are appropriately screened, oriented and managed. Volunteers must go through a recruitment process that includes a criminal records check, reference check and orientation to ensure that they are the right person for the role. Ongoing communication with clients, family members, caregivers or case managers is a key element here. Volunteers are also required to keep in regular contact with the office. Volunteers sign a confidentiality agreement and have ongoing supervision. Client feedback about volunteers is also encouraged. Volunteers must destroy all paperwork listing client information at the end of each day.

*... it is vital that volunteers are appropriately screened, oriented and managed.*

### Risk to the volunteer:

#### Entering clients' homes

Having access to a client's home is a risk to the volunteer as it makes them vulnerable to personal injury as well as potential accusations of theft or abuse. This risk may increase if working with senior clients who are mildly confused. Part of the volunteer role is to perform an informal safety check and to report any potential hazards. Volunteers also sign a liability waiver so that they are aware they are responsible for any damage or injury. Care BC communicates on a regular basis with both clients and their families or caseworkers and will act immediately on any concerns raised. Meals

on Wheels is often part of a larger network of support helping seniors to age in their own homes.

### **Risk to the organization:**

#### **Volunteer demographics**

Due to the timing of Meals on Wheels deliveries, 11 am to 1 pm, the volunteer base is mostly retired people. This is a risk as it makes the program reliant on volunteers who tend to take extended vacations and have last-minute family commitments and illnesses. Care BC makes every effort to diversify our volunteer base by connecting with companies or organizations that can work as a team, promoting to stay-at-home parents whose children are in school and also reaching out to the university student population.

### **Risk to client, volunteers and the organization:**

#### **Boundaries**

Setting boundaries around appropriate client and volunteer relationships is incredibly important. Volunteers are there to deliver food and also take time to check in with the client. However, they do not have time to stay for longer than ten minutes and are not required to perform any household chores or personal care. This is communicated clearly to all volunteers during orientation. Care BC is very supportive of clients and volunteers forming positive relationships, but our role is to pass on concerns or information regarding clients to family members or emergency contacts rather than taking direct action. There have been occasions when clients and volunteers have had visits outside of Meals on Wheels delivery times.

***Setting boundaries around appropriate client and volunteer relationships is incredibly important.***

When this happens, Care BC asks that volunteers let us know. We then reinforce that if they choose to visit a client they are doing so

as an individual and not as a volunteer or representative of Care BC. We will inform the client's family member or contacts of the situation to make sure that this is clear to all parties.

The risk to the volunteer here is that they may start to feel responsible for the client's needs which may be too much for them to take on and have a negative effect on that relationship. The risk to the client is that they may develop inappropriate expectations of the support that a volunteer can provide to them and end up being disappointed. Overstepping boundaries can also affect the organization as volunteers may act outside of their role and potentially harm the reputation of the program.

Risk to vulnerable adults is greater if the client is emotionally or socially isolated. Problems are more likely to occur if volunteers are inadequately trained, poorly managed or lacking support. For these reasons the most important component in Care BC's risk management is communication. Feedback from both clients and volunteers is taken on a daily basis over the phone, via email and in person to

***Risk to vulnerable adults is greater if the client is emotionally or socially isolated. Problems are more likely to occur if volunteers are inadequately trained, poorly managed or lacking support.***

ensure that we have a committed, flexible and caring team of volunteers who are appropriately supervised and trained. We strive to create the safest possible environment for both clients and volunteers.

*Suzanne Liddle has been working in volunteer management for five years and has spent much of this time with programs aimed at supporting seniors. Originally from Northern Ireland, Suzanne worked in the nonprofit sector in Belfast before relocating to Vancouver last year and joining the team at Care B.C.*

## Managing the Volunteer Convergence Phenomenon Volunteers in Disaster Mode

by Brian Cole

In an era when communities and organizations face some tremendous challenges attracting volunteers, there remains a unique and sustained volunteer trend that is probably as old as humanity itself – that is the tendency for people to willingly, without provocation, step up to provide volunteer assistance in times of natural or human-made disaster or civil emergency.

*A distinctive reality is that volunteer engagement during a disaster or civil emergency is often a blend of both established long-term volunteers and episodic volunteers, each of which pose their own benefits and risk management challenges.*

This propensity for average individuals to converge at a disaster scene is not just unique to our U.S. friends or to other foreign countries. The Slave Lake fire, Goderich tornado, Alberta floods and Lac-Mégantic derailment are all examples of recent Canadian emergencies in which volunteers came together to offer assistance, in some cases putting themselves in harm's way.

A distinctive reality is that volunteer engagement during a disaster or civil emergency is often a blend of both established long-term volunteers and episodic volunteers, each of which pose their own benefits and risk management challenges for communities and for organizations that engage such assistance.

For organizations that engage volunteers during a disaster or civil emergency, the potential benefits include:

**Increased organizational capacity:** Volunteers supplement and provide organizations with improved capability to deliver services during an emergency. This was particularly evident during the SARS crisis when both government and health care agencies looked to volunteers to provide supplemental screening, delivery and support services over a protracted period. Volunteers have long provided surge capacity during a crisis and at a significantly reduced cost to government and non-government agencies.

**Continuity of services:** It has frequently been demonstrated that volunteers can help relieve the additional workload produced by an emergency, thereby freeing up organizations and agencies to provide everyday services while assisting with the emergency. Volunteers have also historically provided community businesses impacted by an emergency with needed assistance to help maintain their respective operations.

**Improved capacity and organizational resiliency:** Engaging volunteers during an emergency may foster an interest in longer-term volunteer and/or organizational involvement. It can also help to strengthen an organization's volunteer management capabilities through the practical application, experience and assessment of volunteers.

**Providing specialized knowledge and skills:** Volunteers often bring to the table a broad range of specialized training, knowledge and skills that support the delivery of programs and services before, during and after an emergency.

**Institutional intelligence:** Through their involvement in emergency-related support activities, volunteers may garner useful information that assists an organization with its ongoing development and preparedness.

As for managing volunteers in a disaster or civil emergency, there are a number of factors that organizations need to be aware of which have a direct positive impact on an organization's risk potential. These include:



**Establishing volunteer roles and managing expectations:** It is critical that the right volunteer be assessed and selected for the right role, and this begins with knowing what the role requirements are. When considering engaging a potential volunteer to assist in an emergency, organizations should conduct a thorough risk assessment of each potential volunteer role and formulate a specific volunteer orientation based on that assessment. This includes implementing as many conventional volunteer screening measures as possible (i.e. planning for positions, recruitment strategies, selection and interviews, reference and criminal checks, training and orientation).

These screening measures must take into account the vulnerability of those being served, particularly during a crisis – an important point when rapidly engaging new volunteers that are not affiliated with an organization. Careful consideration needs to be given to these types of volunteers and to their involvement in trust/authority roles including considerations around intensified volunteer supervision.

A well thought out volunteer orientation, in advance of a crisis whenever possible, will consider the scope of the volunteer's involvement as it relates to potential emergencies and should include:

- defined expectations of the volunteer role in relation to the scope of the potential/real crisis or emergency;
- interactions with supervisors, staff, other volunteers and those being served;
- supervisory/reporting responsibilities;
- volunteer performance objectives;
- role limitations and defined boundaries; and
- health and safety considerations to prevent harm or loss to all stakeholders.

**Training volunteers:** Whether established long-term or episodic, volunteers without appropriate training for even the simplest of tasks may be a risk to themselves, the organization and to those being served. It is vital that role-appropriate, safety-oriented

training be provided that is practical and takes into account the learning needs of the volunteer. This requires that organizations consider utilizing supervisors and trainers with the applicable knowledge and skill sets to effectively assess and train a wide range of learners. In the case of rapidly deployed volunteers that are not familiar with specific roles, supervisors and trainers should be comfortable adapting their orientation training to teaching environments that may not be optimal due to the nature of the emergency.

***Whether established long-term or episodic, volunteers without appropriate training for even the simplest of tasks may be a risk to themselves, the organization and to those being served.***

**Supervising volunteers:** Numerous well-intentioned, but ill-prepared organizations that engage volunteers during an emergency become quickly overwhelmed as volunteers converge with offers to assist. Ensuring that there are well-trained volunteer supervisors for every potential volunteer is paramount during an emergency. Organizations and their supervisors need to be cognizant of the scope and limitations of each volunteer role in relation to the type of emergency, including the profile of the volunteer, so that they can effectively control and coordinate a volunteer response. It is critical that organizations have a plan in place to manage volunteer convergence to prevent becoming rapidly overwhelmed and to provide for sufficient volunteer resourcing over a protracted period of time if necessary.

**Deploying volunteers:** Perhaps one of the most unique aspects of volunteer deployment during an emergency is the emergency itself and its impact on basic infrastructure and support. The earthquake in Haiti was a profound example of the challenges well-intentioned volunteer agencies and organizations face during a crisis.

Volunteers from a number of relief agencies were deployed to Haiti only to find that basic housing and amenities for relief workers were virtually non-existent and where they did exist, the roads, communication and infrastructure impacted access. Not to mention concerns related to health, safety and security. All of which are important pre-planning considerations when identifying hazards, assessing risk and managing volunteer engagement.

***While many may consider volunteers as free help, there are significant financial considerations that organizations need to take into account when engaging volunteers during an emergency.***

**Financial and insurance considerations:**

While many may consider volunteers as free help, there are significant financial considerations that organizations need to take into account when engaging volunteers during

an emergency. These can include volunteer food and amenity costs, transportation and accommodation costs, safety and response equipment costs and replacement of damaged or lost volunteer items. In addition, there are costs and considerations associated with liability and insuring against potential harm, damage or loss to the volunteer, the organization and to those being served.

In summary, the certainty of volunteers joining together to assist during an emergency is real and is extremely encouraging. Strong consideration early on to a well-defined strategy and plan to manage the risk of engaging volunteers can significantly bolster a community's capacity and resiliency to respond to and weather a disaster or civil emergency.

*Brian Cole is the Chief Executive Officer (Designate) with the St. John Ambulance Council for Ontario. Brian brings to his professional role four decades of diverse volunteer experience working in a variety of service, humanitarian relief and governance capacities inside and outside of St. John Ambulance.*

## ***Exciting News***

***CJVRM is having a facelift. We are rejuvenating our award winning logo and our website for 2014. We know you will all be as thrilled as we are with the new look and functionality. Until then here is a sneak peek at our new logo.***



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Resources Management

## **Volunteer Firefighters: Desire to Serve, Courage to Act**

by Graham Pawlett

The Canadian volunteer firefighter is an essential asset to communities across the country. Of the approximately 3,500 fire departments and 108,000 firefighters in Canada, close to 80% are volunteers. With the diverse nature of our country and the ever-growing economic concerns within local government, the volunteer fire department is indispensable as it provides emergency services and protection for communities across Canada.

***Of the approximately 3,500 fire departments and 108,000 firefighters in Canada, close to 80% are volunteers.***

The horrendous terrorist attacks on New York, September 11, 2001, resulted in an increased public awareness of the heroism and the dedication of all firefighters. We watched as firefighters fought their natural human instinct and ran towards danger rather than away from it in an attempt to save the lives of those trapped in the World Trade Center towers. Canada too has recently had to deal with major emergencies putting volunteer firefighters on the front line. The train derailment in Lac-Mégantic this past summer took 47 lives and destroyed 30 buildings. Firefighters were on the scene for days extinguishing fires and searching for fellow citizens. During the flooding in High River, the volunteer fire department facilitated the evacuation and aided in the cleanup. Many department members worked to help their community while their own homes were under water. Another huge event that occurred in 2011 was the wildland fires in Slave Lake, Alberta. Over 400 properties were damaged or destroyed by the fire. A number of fire department members were out fighting this blaze while their own homes were being consumed by the

fire. Being a volunteer firefighter takes a special kind of person who is willing to take on the risks and to be dedicated to serve their community.

Throughout Canada we have essentially three categories of fire departments: volunteer (also called “paid-on-call”, “part-time” or “auxiliary”), composite departments, which are made up of both full-time and volunteer ranks and full-time or career departments.

Firefighters, both career and volunteer are extremely committed to the job often taking tremendous risk to protect property and save lives. The hazards faced and risks taken by the volunteers are the same as those taken by career firefighters. Being exposed to hazards such as working at heights, chemicals, smoke, gases, burning structures, biohazards, heat, cold all pose real risks to firefighters. There are also other hidden dangers. Firefighters show a significantly higher increase in rates of cancers than those of the general public. This is due to the various toxic environments they may have been exposed to over their firefighting career. Another hidden risk is the strain on relationships due to time commitments. Volunteer firefighters are on call, 24/7, 365 days a year — some will receive a small remuneration for their time and efforts and many will not receive anything. The strong desire to help, to be involved and to make a difference within the community is what drives individuals into the volunteer fire service. Most want to feel recognized for their efforts but all will have a feeling of satisfaction when called upon to perform at an emergency scene.

***Firefighters, both career and volunteer are extremely committed to the job often taking tremendous risk to protect property and save lives.***

Firefighting is a very demanding job both physically and mentally. A firefighter must have no fear of confined spaces, total darkness or heights and must be able to cope with the sight of blood and with sometimes tragic situations. Being on call can add to the stresses of life as there are times when, due to emergency situations, family and friends will not always be the priority they should be. The stresses of firefighting are not only experienced by the firefighter but also by their family. The work is dangerous. However, it is also intensely rewarding and comradeship is very strong within the fire service.

The name firefighter is somewhat misleading as the emergencies faced by volunteer departments extend well beyond that of fighting fires. Departments must be able to deal with all types of emergencies, everything from environmental emergencies, medical calls, hazardous materials, confined space rescue, automobile extrication, swift water rescue, ice rescue and so on. Volunteer departments also will take on fire prevention and education activities for their local communities. Just as diverse as the landscape and cultures of Canada so too are the volunteer fire departments. Many are well equipped and supported by their communities, while others struggle for equipment, manpower, proper training and good leadership. Standards and safety regulations are in place to govern how many firefighters are required to properly serve the

community. This, along with the almighty dollar, will dictate the size of a local fire department and what equipment they may have.

***The name firefighter is somewhat misleading as the emergencies faced by volunteer departments extend well beyond that of fighting fires.***

Retaining volunteers is a major concern for most departments. Recruitment drives seem to be at least an annual event for many departments. A new fire recruit can be expected to commit one night a week plus some additional weekends throughout the year to train. Aside from the training, department activities such as local charity work and responding to emergency calls is a huge demand on a volunteer firefighter's time.

Volunteer firefighting provides the opportunity to get involved and help your community. Although there are risks, the rewards are great.

*Graham Pawlett is a Captain with the Port Moody Volunteer Fire Firefighters Association, and the BC Director for the Canadian Volunteer Fire Services Association. He has been a volunteer firefighter for 28 years.*

## ***Risk Management***

***We have all heard that the only way to totally remove all risk from a volunteer organization is to not provide any services or programs at all. Of course this totally defeats the purpose of our existence. The balance is found in risk management: assessing what risks exist within each unique organization, program or activity and then taking steps to minimize that risk. We invite you to look again at issue 18.3 of the Journal (Fall 2010) that focused on Recruitment and Screening. It will act as a good partner to this issue on Risks and Demands.***

***The CJVRM Editorial Team***



## Minimizing the Risks of Being on a Board of Directors

by Elva Keip

Sadly for the nonprofit sector, it is not uncommon to hear or read about fraud, embezzlement, conflicts of interest, staff suing a nonprofit organization, and even bankruptcy. Further, as more organizations reach out for private donations, government support and foundation funding, there is increased pressure on boards to demonstrate a significant return on investment; in other words, the money provided to the organization is being spent well and yields measurable, noticeable results. The process for determining whether or not to fund a particular organization, or a program within an organization, often includes an assessment of how well the organization is managed by the board, its risk management practices and its evaluation processes and results.

***Directors on a board are legally responsible for the management and accountability of their organizations.***

Directors on a board are legally responsible for the management and accountability of their organizations. This is reflected in key aspects of operations, planning, financial management, human resources and community relations. While some tasks can be delegated to a senior staff person, the board retains legal and financial responsibility. Yes, boards of directors and individual directors can be sued, although that is not common in Canada.

### What does that really mean to a board member?

There are a few over-arching duties that can never be delegated:

1. Directors must conscientiously manage the organization's financial affairs in a way that benefits the organization, employees, volunteers, clients and creditors. This is known

as fiduciary duty. Although the courts have less stringent requirements for nonprofit organizations than for corporations, board members are still required to act honestly, in good faith and in the best interests of the organization. A director never directly or indirectly profits from a board decision or an organization's activities.

***Directors must conscientiously manage the organization's financial affairs in a way that benefits the organization, employees, volunteers, clients and creditors.***

Directors must put the interests of the organization first, even above personal interest, and avoid conflicts of interest (potential, perceived and real).

2. Directors exercise the skill, diligence and care of a reasonable person in a comparable situation.

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For example, if a director is an accountant or lawyer, they have a duty to achieve a standard of care that corresponds to their professional abilities; however, no director is expected to be an expert in every area. Their duty is to consult experts outside the organization.

3. Directors ensure that statutory requirements are met. This means adherence to the organization's bylaws as well as to federal and provincial legislation and municipal bylaws, such as employment standards; health, safety and fire regulations, remittances to Canada Revenue Agency of deductions from wages, protection from discrimination and adherence to information privacy requirements.

The law specifically addresses two situations where the organization's liabilities are also the directors' liabilities for a maximum period of six months:

- ♦ Deductions at source – if a director completes their term in office or leaves the board before the organization becomes insolvent, but the insolvency occurred within two years of leaving the board, the director could still be liable. The good news is that a director can file a due diligence defence.
- ♦ Unpaid employee wages (salary and vacation pay) – the government has two years to file a claim against the directors, and there is no due diligence defence.

Two other obligations for directors are not rooted in law but in respect for the organization and its work. These are confidentiality and loyalty.

***Two other obligations for directors are not rooted in law but in respect for the organization and its work. These are confidentiality and loyalty.***

Directors have an obligation to keep organizational business private, so confidentiality is expected on matters related to personnel, clients, finances and legal issues. In fact, some organizations require directors to sign a confidentiality statement. Loyal directors recognize that the board acts as one entity and they support the decisions of the board, even if they do not personally agree with the decision. While there may be lively discussion on an issue, once a vote has occurred, directors are expected to support the decision publicly. This does not mean that the issue cannot be raised or revisited at a future board meeting.

***Directors can take many actions to minimize the risk of personal liability.***

### **What do all these statements mean on a day-by-day basis?**

Directors can take many actions to minimize the risk of personal liability. These include:

- ♦ Attend all board and annual meetings and participate in making decisions. If you strongly disagree with a decision that the board has made, ensure that your opposition is recorded in the minutes. (This allows a due diligence defence, if needed.)
- ♦ Ensure that the organization fulfills the requirements of its bylaws and any governing legislation.
- ♦ Insist on written and followed board membership and nominating procedures.
- ♦ Be a member of the organization, as outlined in the bylaws (not all organizations have membership).
- ♦ Ensure that the organization keeps a written, permanent record of all board minutes and official actions. Be familiar with the minutes.
- ♦ Ask that all reports be given in writing at board meetings (they can be distributed ahead of time).
- ♦ Be familiar with the organization's mission, objectives, goals, programs and services. Ensure that the programs and services do not deviate from the mission and long-term objectives.
- ♦ Manage the organization's business in a manner that is consistent with the mission and objectives.
- ♦ Be certain that necessary policies exist and are clearly written and that the board and staff adhere to them.
- ♦ Insist that the organization has a policy on volunteer liability and that it has directors' and officers' liability insurance.
- ♦ Regularly review the adequacy of the organization's insurance coverage.
- ♦ Question matters concerning policy and practice. Be sure you understand clearly.
- ♦ Avoid self-serving policies.

- ♦ Disclose any potential, real or perceived conflict of interest immediately. Excuse yourself from any discussion and decision making in those situations (physically leave the room).
- ♦ Ensure that the organization's financial records are audited annually by a firm of chartered public accountants.
- ♦ Understand the organization's finances, including the budget and budget process. Know who is authorized to sign cheques and use the organization's credit card and know its maximum limit. Ask questions and get answers (treasurers are happy to answer questions).
- ♦ Monitor the organization's image at both community (client) and professional (organizations) levels, including any publications.
- ♦ Get outside expert advice whenever necessary or prudent.
- ♦ Support professional development for staff and volunteers.
- ♦ Commit resources to developing and updating board and staff orientation materials.
- ♦ Ensure that procedures are updated as often as necessary.
- ♦ Ensure that evaluation occurs regularly – of programs, services, staffing, the board itself and the whole organization.

#### Maybe I should say no?

Being a director on a board is a wonderful experience. It is exciting to see an organization flourish because the board and staff are working together and each diligently carrying out their work.

***Significant means to a positive experience are asking key questions before joining the board and minimizing risk of liability while on the board.***

Significant means to a positive experience are asking key questions before joining the board and minimizing risk of liability while on the board. If you know what you may be faced with before making the commitment, you can spend your time on the board enjoying your experience and opportunity to gain new skills.

You can do it and enjoy it!

*Elva Keip is a lifelong volunteer who has worked with many boards of directors in the Ottawa area, assisting them to become more effective in carrying out their responsibilities. She works for a nonprofit organization and serves on a board of directors at another organization.*

### Questions to Ask before Joining a Board of Directors

If you are thinking about joining a board, be sure you know what you are getting into. Some key questions to ask include:

1. What is the organization's mission?
2. What is the role of the board?
3. What is the meeting schedule?
4. What is the organization's financial condition?
5. What are the organization's major fundraising and program goals for the next three years?
6. What is a director's responsibility in fundraising?
7. What orientation and board development activities are planned?
8. Why exactly am I being asked to serve on this board?

## Exploring Hard-to-Fill Volunteer Roles in a Nonprofit Violence Against Women Shelter

by Evelyn O'Gwang

Volunteering is critical business for many nonprofits today. Linda L. Graff and Susan J. Ellis both note that the assignments of greatest importance for volunteers are often inherently risky. According to Statistics Canada, over 13.3 million people – accounting for 47% of Canadians aged 15 and over – volunteered in 2010. It is hard to imagine the nonprofit sector operating effectively without the time, skills and commitments of volunteers.

The Redwood is a violence against women shelter in Toronto. Volunteer engagement at The Redwood ranges from frontline work such as preparing meals to serving on the board. Some volunteer positions are inherently risky because the residents served are fleeing violent partners while others are hard to fill due to internal or external factors.

***Some volunteer positions are inherently risky because the residents served are fleeing violent partners while others are hard to fill due to internal or external factors.***

Internal factors include real or perceived fears by organization staff in using volunteer services when working with clients around uncharted paths. External factors include statutory obligations, as well as societal myths and stereotypes about shelters, resulting in low volunteering demand among prospects.

Regardless, there are always risks associated with volunteering and using volunteer services. Every organization must grapple with its own tolerance for risk. Fear of liability should not lead to confined

***Regardless, there are always risks associated with volunteering and using volunteer services. Every organization must grapple with its own tolerance for risk.***

roles for volunteers. There are ten ways in which The Redwood has dealt with recruiting volunteers for the hard-to-fill roles:

### ***1. Develop integrated human resource strategies that include volunteer resources.***

Human resource policies and practices are based on the scope, requirements and boundaries of the position. The strategies include the creation of an inclusive and safe working environment, effective initial engagement techniques, opportunities for training and recognition as well as feedback mechanisms.

### ***2. Reassess requirements for the hard-to-fill volunteer positions.***

This involves scrutinizing the volunteer position and realigning thinking or structure to make it work. The key questions have been, “What is the cost of not filling the volunteer position? Where are the pain points and who feels them?”

### ***3. Be sensitive to gender, culture, language and age.***

The Redwood operates within an Anti-Racist/Anti-Oppression Framework. It goes above and beyond statutory obligations to recruit a diverse volunteer base reflective of the clients served. Human rights and employment standards are upheld when working with volunteers.

### ***4. Take advantage of technology.***

Use the organization’s website, social media, industry contacts and association memberships to recruit volunteers. These include The Redwood’s website, Facebook, LinkedIn, Twitter, Eventbrite, Charity Village and Volunteer Toronto.



**5. *Build meaningful relationships and set clear expectations for volunteers.***

The Redwood avoids unintended liability by providing explicit direction. The Redwood does not assume that its interpretation of “common sense” will prevail.

**6. *Acknowledge that volunteering is a two-way relationship.***

The Redwood seeks to understand where volunteers are in their life cycle and creates an open dialogue where volunteers feel comfortable to let staff know what would make their experiences most satisfying, when they need a change, and when it is time for them to move on.

**7. *Highlight that the safety of clients, staff and the organization is paramount.***

The Redwood never permits the continued presence or involvement of a volunteer who poses a threat to safety. The Redwood engages in risk management and acknowledges that there are no guarantees in risk management.

**8. *Provide insurance for accidents and governance risks.***

The Redwood makes use of professionals such as lawyers or insurance brokers to mitigate or minimize risk. Resources are invested to ensure adequate training and equipping of volunteers before they are assigned roles.

**9. *Provide continuous screening for the duration of a volunteer's engagement.***

Volunteers are subject to discipline leading up to and including termination. The Redwood has clear policies and procedures that include receiving and taking action on volunteer complaints.

**10. *Give immediate attention to volunteer and related client or staff injuries.***

The Redwood evaluates whether future injuries can be prevented with training, equipment or other measures. It identifies how the organization's response to a similar incident in the future can be improved.

Most hard-to-fill volunteer positions are problems begging for solutions. Once unearthed, the associated difficulties can be addressed and corrected. While none of the risks posed should be ignored, few, if any of the risks represent insurmountable obstacles for any typical organization. Balancing risks and rewards in volunteer resource management will enhance the effectiveness of nonprofits and facilitate the attraction and retention of volunteers for key assignments.

*Evelynn Ogwang is the Manager of Volunteer Resources at The Redwood and a Programming Co-Chair with TAVA. She has over 18 years' experience working with volunteers locally and internationally. Evelynn holds a Law Degree, Volunteer Management Certificate and is a Certified Volunteer Resources Manager through CAVR and PAVR-O.*

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## CoSA Volunteers – How to Get Them and Keep Them

by Adina Ilea

Circles of Support and Accountability (CoSA) is a Canada-wide community-based initiative, operating on restorative justice principles, which assists individuals who have served a prison sentence for a sexual offence(s) in their effort to re-enter society. These individuals, who we refer to as core members, participate in the program voluntarily and are not mandated by the judicial system or parole board review. An integral component of the CoSA program involves both the support of core members and volunteers as well as the careful management of risk.

***An integral component of the CoSA program involves both the support of core members and volunteers as well as the careful management of risk.***

CoSA-Ottawa requires that trained and screened volunteers make a one-year commitment to meet regularly as a group — each circle consists of three-to-five volunteers and one core member — and individually with their core member on an as-needed basis. The volunteers become the core member's consistent network of emotional support, helping him develop constructive and pro-social strategies and solutions to everyday problems and facilitating his practical needs, such as access to medical services, social assistance, employment and affordable housing. Volunteers are also tasked with holding the core member accountable in ways that do not shatter the trust they have built but rather enhance it. Holding the core member accountable is a form of support.

There are three areas where managing volunteers can pose challenges: recruitment, oversight and retention.

### Recruitment

Our volunteers generally fall into two categories: students and young professionals in their twenties,

***There are three areas where managing volunteers can pose challenges: recruitment, oversight and retention.***

mainly females, who are looking for hands-on experience in the criminal justice field or retired individuals in their sixties and seventies who are involved in their communities. Although students bring energy and creativity, their involvement is often finite due to the priority of their career development, whereas newly retired individuals bring rich life experiences and can typically commit to a longer duration. Ideally, each circle is comprised of volunteers of both genders, representing a variety of backgrounds, experiences, interests and ages. Due to lack of resources and the pressures of daily operations we have not yet been able to implement an effective recruitment strategy that addresses this issue.

### Oversight

While volunteering with marginalized, institutionalized and stigmatized individuals, such as our core members, can be rewarding for volunteers, it can also be emotionally draining. Volunteers become part of the core member's integration journey, weathering the ups and downs inherent in the process. Core members face many challenges: attempting to find employment and housing that does not require a criminal background check, accessing medical and psychological care to deal with physical and mental health issues, dealing with stigma and discrimination, forming relationships and finding a meaningful place in society.

When core members have setbacks, such as health problems, breaching their legal conditions or simply making decisions that are not constructive to their well-being, volunteers can experience frustration, disappointment and disillusionment. While we cannot guarantee that our volunteers will not

experience these strong negative emotions, we take steps to ensure that they are supported by staff and members of our board of directors. Staff and board members attend training sessions and special events where they interact with volunteers and core members in informal ways, fostering rapport and trust. Recently we added a session to our training program in which we invite past and current volunteers to share with the new recruits the challenges they have faced and the strategies that they have found useful.

There can be real ramifications if volunteers do not fulfill their obligations as circle members. Volunteers are tasked with supporting the core member but also with watching for warning signs of possible relapse into the offence cycle (a series of behaviours that precipitate offending, such as depression, absence from treatment, substance abuse). Core members sign up with CoSA because they want help in their integration process. By regularly attending circle meetings, the program coordinator is able to assess how each circle is functioning. The volunteers are also required to submit a volunteer log each month that indicates the frequency and length of their meetings with their core member. This allows CoSA staff to assess whether volunteers are fulfilling their obligations. It also provides an opportunity if changes need to be made to the circle composition. Changes might include adding another volunteer to a high-needs core member so that his existing volunteers are not over-worked, do not suffer burnout, lose interest or possibly miss red flags. We have also implemented annual reviews and exit interviews of volunteers and core members, offering them an opportunity to share their thoughts and experiences with CoSA.

### Retention

As previously mentioned, volunteering for CoSA can offer many rewards but can also be difficult. Each year we organize a special event to show our volunteers that we appreciate their hard work, dedication and commitment. We have organized overnight volunteer retreats with yoga and Zen meditation, team-building games, group discussions

and restaurant outings. Each volunteer receives a hand-written thank you card from the program coordinator – all small tokens of our recognition for the countless hours that our volunteers dedicate to CoSA.

The importance of recruitment, oversight and retention allows CoSA-Ottawa to balance risk management and community reintegration.

For information about CoSA-Ottawa, please visit [www.cosa-ottawa.ca](http://www.cosa-ottawa.ca)

*Adina Ilea is a CoSA-Ottawa volunteer and part-time staff member. She is also completing her PhD in criminology at the University of Ottawa.*

The Canadian Code for Volunteer Involvement is a framework for involving volunteers in all levels of an organization.

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## Assessing a Volunteer's Emotional Suitability: A Difficult Screening Task

by Arianne Richeson

The Distress Centre of Ottawa and Region (DCOR) provides emotional support and crisis intervention to nearly 40,000 callers each year. People phone the agency's crisis lines to talk about issues such as bereavement, mental illness, addiction, partner abuse, interpersonal stress and thoughts of suicide. Since DCOR is a volunteer-based organization, these tens of thousands of calls are answered by a team of over 200 trained volunteers.

Although volunteers receive extensive training in preparation for their role as crisis line specialists, they are also in positions of incredible trust given the vulnerability of those calling. Careful screening is essential and cannot possibly be addressed solely with reliance on a police records check. While an essential part of DCOR's risk management strategy, a records check cannot assess whether an individual has recently struggled with addiction, lost a loved one to suicide or taken a leave of absence from work due to overwhelming stress. The ideal crisis line volunteer is emotionally stable, patient and non-judgmental. Managing risk by seeking these qualities in a volunteer is a difficult and sometimes imperfect task.

***Although volunteers receive extensive training in preparation for their role as crisis line specialists, they are also in positions of incredible trust given the vulnerability of those calling.***

One of DCOR's primary screening tools is the volunteer application form. To the surprise (and sometimes displeasure) of prospective candidates, the written application is extensive. In addition to

standard questions relating to a person's interests and relevant skills, the application seeks to assess an individual's emotional suitability. Prospective volunteers are asked which issues they might have difficulty being objective about. They must discuss whether suicide has touched their lives and describe any significant stressors that may have recently impacted their physical or mental health. The goal of these questions is to assess whether an applicant is considering the volunteer opportunity during a time of stability and wellness.

While an essential part of screening, these personal questions are also problematic. We must be careful that an applicant's health or past experience with trauma and crisis is not a barrier to volunteerism. In fact, many of our most capable team members are those who have experienced hardship in the past and who are therefore able to convey tremendous empathy to people in distress. The important caveat is that a person needs to have worked through their past stresses in order to be able to give back to others. Many people are drawn to crisis work because they want to help those who have been through similar difficulties to their own. When a crisis is recent, the volunteer may not be able to objectively focus on the caller.

***The ideal crisis line volunteer is emotionally stable, patient and non-judgmental. Managing risk by seeking these qualities in a volunteer is a difficult and sometimes imperfect task.***

Several years ago DCOR consulted with legal counsel to ensure that questions meant to ensure emotional stability were not infringing on a candidate's human rights. We are always struggling to find a balance between the needs of our organization, our callers and our volunteers.

Given the personal nature of the application questions, it is remarkable how many people share their past histories with honesty and candour. Nonetheless, there are likely instances where



applicants are less than forthcoming. In addition to extensive reference checks, DCOR considers its 59-hour volunteer training program to be an extension of the screening process. While the goal of training is to help volunteers feel ready, willing and able to take crisis calls, the process is also meant to

***While the goal of training is to help volunteers feel ready, willing and able to take crisis calls, the process is also meant to encourage significant self-reflection.***

encourage significant self-reflection. Throughout training, volunteers are asked to think about the kinds of calls that might be the most stressful. In many cases, the most difficult conversations are those that resonate personally. Role play scenarios allow volunteers to practice challenging calls and imagine the emotional impact that these might have. This process helps staff to determine when crisis line work may not be the best fit for certain volunteers. Once trained, volunteers are monitored to ensure that the emotional demands of the role are not proving overwhelming.

Only 25 percent of applicants to DCOR are selected as volunteers. Screening procedures for the organization are rigorous because the stakes are equally high. Callers in crisis require a stable approach from each volunteer team member. Considering the emotional suitability of volunteers is a challenging task but one which is vital to the ongoing wellness of the organization's team members and clients.

*Arianne Richeson is the Manager of Educational Services with the Distress Centre of Ottawa and Region. Arianne provides training for the Distress Centre's crisis line volunteers and throughout the community in the areas of communication, crisis intervention and suicide awareness.*

## Volunteer With the Journal

There are several ways you can contribute to the Journal:

- **Be an Author** – Do you have something you would like to share with your colleagues across the country? Check out the last page of the Journal for upcoming themes and deadlines, and see if any of your burning issues fit.
- **Be a Regional Representative** – If you live anywhere in Canada and are connected to the voluntary sector in your community, you can help out by suggesting ideas for themes for upcoming issues, and by seeking potential authors in your area of the country. Through you, we can help achieve a national perspective.
- **Be an Editor** – If you live in the Ottawa area, you may consider joining the Editorial Team directly, especially if you have a connection to the voluntary sector. New members and new viewpoints are always welcome.

For more information about volunteer opportunities, email us at [contact@cjvrm.org](mailto:contact@cjvrm.org).

## **“She stole a pack of baby wipes for her baby; she lives with poverty ...”**

by Ruth Pentinga

The many and varied details of our roles as managers of volunteer resources are acknowledged, exercised and appreciated. I now want to share how I approach both philosophically and attitudinally the important and essential work of manager of volunteers. We hold a lot of power as managers of volunteers and, as we have heard from our friend Spiderman, “with great power, comes great responsibility.”

***We hold a lot of power as managers of volunteers and, as we have heard from our friend Spiderman, “with great power, comes great responsibility.”***

A woman who came to fulfill her 20 hours with us, shared that her crime was to steal a pack of baby wipes. I was almost embarrassed for *the-powers-that-be* that sent this woman to do hours for taking something, which really, should be made available for those who need it. I know she broke the law and had to make restitution but this is where my attitudinal approach can help. In my opinion, she was being “doubly punished” for being poor and being reminded of that fact by having to tell her story to the courts and to me. So my thought was, how can I respect her as a person and make this as easy as possible while still fulfilling the court’s order? I have that power and that responsibility. I believe that my job can and should contribute to a more civil society – that is my philosophy.

I know that engaging people who are required to do Community Service Orders (CSOs) can put us, as managers, through a whole range of experiences, good and not so good. It seems demanding and

risky to engage people who have broken the law in some form or other. I am aware that not every CSO person is like this lovely woman (who came to me for her 20 hours). I get it! It is challenging and it is risky but is it riskier than engaging people we assume have not broken the law? Just because we now know, does that change how we function as managers of volunteers? Should it?

***It seems demanding and risky to engage people who have broken the law in some form or other. ... I get it! It is challenging and it is risky but is it riskier than engaging people we assume have not broken the law?***

Managers of volunteer resources put into place our protocols and policies for judicious reasons. These standards of practice, which include sound screening measures, do not have to hinder us from engaging people who can not only help us with our work but who can also benefit from their involvement. At Yonge Street Mission (YSM) we ask every adult person who has to fulfill hours, point blank, what their crime was. To fulfill our bottom line, which is the safety and wellbeing of our vulnerable population, we have constraints in place around which crimes will prohibit CSO’s involvement. Once we establish that the offense does not fall within our prohibited list we move forward with determining whether or not we have the capacity to engage them at that time and to ascertain the fit for their involvement. This is very similar to how we screen and place volunteers who just want to help.

***Managers of volunteer resources put into place our protocols and policies for judicious reasons.***

***Once we establish that the offense does not fall within our prohibited list we move forward ... to ascertain the fit for their involvement. This is very similar to how we screen and place volunteers who just want to help.***

In the past year at YSM we have had more people approach us for CSOs than ever before. I am not sure exactly why, but dealing with this influx can be overwhelming at times. At the end of the day we have to learn to say “no” to some. But when we do say “yes” we find that the results can be transformative. Take for instance the young man who worked hard fulfilling his 50 CSO hours with us. He shared, when he was departing, that he had experienced something here that was surprisingly brand new to him. Sadly he had never, in his 20 young years, experienced people being nice for no reason, with no hidden agenda behind their demeanor. Working with some of our staff allowed him to glimpse people being nice; something that thankfully so many of us experience daily. I like to think that because I was able to say, “yes” that day to him he was affected in a positive way that may work towards a transformation in his life.

I know that the courts put these kinds of unrealistic demands on our organizations and it is not fair. I also know that some people doing CSOs can frustrate us. Believe me, in more than 13 years in this field, I have seen some things. I also realize that many of us do engage CSO volunteers. But for some of us to allow for those unfortunate few to tarnish our impressions of others, to the point where we say “no” all the time, is a disservice to our society.

***We need to at least try to use our positions as we can, even if it is to engage just one person who has to fulfill a CSO.***

We need to at least try to use our positions as we can, even if it is to engage just one person who has to fulfill a CSO. We never know when our roles can make a world of difference in people’s lives and in the lives of those they in turn touch! We have the power – let’s use it.

*Ruth Pentinga has worked in the field of volunteer management for over 13 years and has been the Director of Volunteer Resources with Yonge Street Mission in Toronto for the past seven years. Ruth has been an active PAVR-O Mentoring Program Committee Advisor for the past 4+ years as well. Ruth is currently pursuing a Masters of Divinity, part-time, at the University of Toronto’s Emmanuel College.*

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## Peer Expert Response

by Rachel Stoparczyk

**Question:** *Do you have in-depth policies relating to the nature of convictions on criminal record checks?*

**Response:** Far too many variables exist to recommend a practice of identifying convictions for which we would screen in or screen out potential volunteers. For those presenting with a criminal record, their offences must be balanced against the bone fide requirements of the position they are applying for. Does the conviction demonstrate behaviours that will jeopardize our duty of care when placing this volunteer in a specific role?

This is a difficult question to answer, representing a great responsibility to both the clients we serve and the community members who seek to make a positive impact through volunteering with our organizations. I strongly recommend that these decisions are never made alone. At the Ottawa Children's Treatment Centre, our policy states: "there will be an opportunity for volunteers with a positive records check to discuss their history with the Coordinator, Volunteer Resources & Quality who will determine the relevancy of the information and the suitability of the volunteer in conjunction with the Director, Human Resource Services."

Recently, a volunteer applying to work with children with special needs came forward with a police records check that identified an existing conviction. He met with me to explain the circumstances of his one and only offence for impaired driving. I learned more about this individual's honesty, integrity and motivations to serve through this conversation than I did through our prior interview or from his character references. Given that the volunteer role did not involve driving, I advocated that he should be accepted onto our team and my director agreed.

These thoughtful discussions will undoubtedly change with context, depending on the individuals we serve and our perspective on crime and rehabilitation. While we must never take lightly our obligation to protect vulnerable persons or an agency's resources (and I would argue that one of these must be at risk to warrant a police records check), we must also consider the rights and dignity of the community members who stand on the other side of the gates we are keeping.

For more information on this topic, I recommend the 2012 edition of *The Screening Handbook* by Volunteer Canada, available at: <http://volunteer.ca/content/2012-screening-handbook>.

*Rachel Stoparczyk is the Coordinator, Volunteer Resources & Quality at the Ottawa Children's Treatment Centre. Rachel has a certificate in Volunteer Resources Management from Algonquin College and is a CVA candidate for 2013. She has over eleven years of experience managing volunteer services.*



# Canadian Journal of Volunteer Resources Management

## Editorial Process and Guidelines for Authors

### Objective

The Canadian Journal of Volunteer Resources Management intends to:

- serve as a credible source of information on the management of volunteers in Canada;
- provide a forum for the exchange of ideas and to encourage networking among managers of volunteers;
- provide a professional development tool for managers of volunteers;
- recognize and encourage Canadian talent in the volunteer management field; and
- include in each issue at least two articles that present different views on a specific theme.

### Target Audience

The Journal's intended audience includes managers of volunteers, educators, media and funders of not-for-profit organizations across the country.

### Upcoming Themes and Deadlines for Submissions

To submit an article for any of the above themes, please inquire with [contact@cjvrm.org](mailto:contact@cjvrm.org). The Editorial Process and Guidelines for Authors are available upon request.

Issues	Deadlines	Themes
Volume 22.1	January 31, 2014	<b>Fundraising Volunteers</b> – looking at all aspects of fundraising volunteers, from recruitment to retention; understanding relationships between fundraising volunteers and fundraising staff; working with volunteer schedules and time deadlines; assisting fundraising volunteers to move on within an organization
Volume 22.2	April 30, 2014	<b>Engaging Youth</b> – seeking ways to entice youth to volunteer and to help make volunteering a way of life from a young age; the necessity of social media and youth volunteers; assessing high school students' 40 hours community service requirement for graduation
Volume 22.3	August 31, 2014	<b>When Volunteers Leave</b> – examining all aspects of when volunteers leave an organization, by their choice or not; tackling how to fire volunteers; exploring legal issues when dismissing volunteers; ensuring succession planning for hard-to-replace volunteers

### Advertising Guidelines

Limited advertising space will be allowed in the Journal, for materials of direct relevance to managers of volunteer resources. Email [contact@cjvrm.org](mailto:contact@cjvrm.org) for more information.