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RECORD KEEPING:  
PAIN OR GAIN

LA TENUE DE LIVRES -  
ON A RIEN SANS RIEN?

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## EDITORIAL

Record Keeping Pain or Gain came as a result of a lively conversation with the Editorial group when trying to find the best ways of keeping information on our own volunteers. Keeping the essentials and discarding duplication help to create a more efficient way of managing your human resource. We hope to help you find a system that works for you.

We have been able to collect some fascinating tips and hints and hope that you are able to find some information that will assist you in your own record keeping.

Charlene Robson provides practical information on not only why we keep records but what should be in those records. She identifies the importance of keeping up-to-date with legislation. In 'To Keep or Not to Keep', Diane MacFarlane explores step by step the reasons for keeping accurate and current records. Mary T. Satterfield explains the importance of understanding the Privacy Act when starting to collect data for records.

The final articles share a common theme with what to do with the information you collect and what software might be best for you. Kim Brereton and Rosa Venuta look at the importance of a Human Resources software package. Yvonne Harrison's article 'What Influences the Use and Effectiveness of Information and Communications Technology', samples 462 volunteer programs to create a report on the use of ICT in today's programs. We are also fortunate to have Susan and Dan Wagener talk about the role a software designer has in creating the best software for your specific task. Justin Ho provided a comprehensive look at many software packages that might be right for you.

Peer Experts' Diana Boudreault and Dawn Lasby provide excellent tips and tools for identifying what information to keep and where to store it.

The subjects are varied and the articles full of hints and useful information. It is our hope that we have helped demystify Record Keeping so you can trade 'pain' for 'gain'.

Lynne Whitehead  
Editorial Member

## WHY KEEP RECORDS?

by Charlene Robson

There are three main reasons for keeping records; recognition, accountability and liability. The competency of an Administrator of Volunteer Resources (AVR) will be reflected in their record keeping. Any AVR should be able to step into another volunteer program and know who the volunteers are, where they volunteer and have the ability to answer basic questions such as how many hours a volunteer has contributed and when the volunteer started. A good set of records should also allow for some measurement of the program's success and indicate opportunities for improvement.

Recognition is not simply the ability to know whom to thank during the annual volunteer appreciation event. Recognition is also being able to access information on where volunteers contribute their hours, how to reach them in order to thank them and knowing them sufficiently to provide a reference for a job or school entrance forms. Basic forms that all AVRs should keep for each volunteer include:

- ♦ application form;
- ♦ confidentiality agreement;
- ♦ interview form;
- ♦ time sheet;
- ♦ job description;
- ♦ training and recognition records;
- ♦ evaluation form;
- ♦ incident reports; and
- ♦ discharge form or exit interview.

Some other forms to consider would be a consent form for reference checks, criminal record search, copies of reference letters or resumes.

The application form should include the following basic information:

- ♦ first and last name;
- ♦ address;
- ♦ contact phone numbers;
- ♦ e-mail;
- ♦ emergency contact;
- ♦ references;
- ♦ signature for permission to contact references; and
- ♦ disclosure statements required by the Privacy Act.

The interview form is a tool to establish that you have selected the appropriate volunteer for your organization. If called upon, the interview form could be the proof that all volunteers were interviewed and screened in the same manner. The form will also be an indication that volunteers are protected from discrimination, as decisions were made from a set of standard

questions that reflected the needs of the volunteer program. Even after records are discarded, having an established policy for interviews and a standard form will prove that volunteers were properly screened.

If a volunteer program does not have a computer sign-in to track volunteer hours, it is strongly encouraged that volunteers have an individual sign-in sheet. This can be a sheet that people mail in to the office or sign-in on site. The time sheet should include:

- ♦ time started;
- ♦ time ended;
- ♦ task; and
- ♦ initials.

The time sheet serves as an indisputable record of their volunteer hours. The hour record is also recognition that administrators appreciate the volunteer's hours and helps to confirm hours for employment or school applications. Hours are also ways to measure the volume of volunteer service that your organization provides.

Role descriptions set the perimeters for volunteers and demonstrate to insurers and unions that a volunteer's role is safe and does not threaten jobs of paid staff. The role description also recognizes that volunteers need to know their role in order to perform appropriately, understand their limitations and how to succeed. The role description should include:

- ♦ position title;
- ♦ objectives;
- ♦ responsibilities / expectations;
- ♦ qualifications;
- ♦ training;
- ♦ benefits; and
- ♦ role of supervisors.

Evaluation forms on individual volunteers are important to provide feedback to volunteers, recognizing the importance of the service that they provide. The forms can also serve to help evaluate current volunteer programs and add to or adjust the role of volunteers. They are also a reference for calls or letters from employers and schools. The evaluation could include asking staff/clients:

- ♦ Was the volunteer dependable?
- ♦ Considering the role and the role description of the volunteer, how successful was the volunteer in fulfilling his/her role?
- ♦ What skills could the volunteer develop to be more successful?

Liability and accountability should be a concern of all AVRs. Linda Graff in her book, *Beyond Police Checks: The Definitive Volunteer and Employee Screening Guide Book*, echoes this statement by stating that the paper trail and informative documentation should provide a "solid basis from which a defense can be

launched in response to any legal action, " (Graff,1999: 38). Best practices in volunteer management with regard to record keeping should be maintained. Standards of practice have been developed by many organizations such as the Administrators of Volunteer Resources of British Columbia. Their standards can be viewed at [www.avrbc.org](http://www.avrbc.org). The Canadian Administrators of Volunteer Resources and the Canadian Code for Volunteer Involvement advocate for similar standards. All record keeping standards require compliance with the Human Rights Codes, Freedom of Information and Protection of Privacy Act and the Employee Standards Acts.

The Codes and Acts set limitations regarding which records one should keep and collect. Information that violates the Codes and Acts should not be collected. A necessity-test can help sort out what information should be collected to reduce the risk to a program. When thinking about a form or questions, ask:

1. Is this information necessary?
2. Why is it necessary?

It may be helpful to document the necessity-test information, in the event that justification of decisions is required at a later date.

When deciding how long to keep records, ask Human Resources staff how long they keep employee records. Volunteer records should be kept the same length of time as employee records. In each Province, the Employee Standards Act legislates the minimum length of time for records to be stored. The minimum standard for British Columbia, is three years but many organizations exceed the minimum standard.

Be vigilant; follow legislation and standards of practice to demonstrate commitment to volunteers and the organization. Good record keeping enhances volunteer satisfaction, improves the volunteer program and reduces the risk of liability. Local Volunteer Centre libraries, Volunteer Canada and the Canadian Centre for Philanthropy websites provide resources and links. Conferences and local workshops can also assist in keeping one up-to-date on the changing legislation and best practices in the field of volunteer management.

#### **Works Consulted**

- Emmel, Vincent. *The Management of Personal Information and Protection of Privacy*. Le Societe quebecoise d'information juridique, 1998.
- Graff, Linda. *Beyond police checks: the definitive volunteer and employee screening guidebook*. Linda L. Graff, Dundas, Ontario,1999.
- Weaver, Liz. *Canadian Code for Volunteer Involvement*. Volunteer Canada, 2001.
- Administrators of Volunteer Resources-BC. Standards of Practice. 2001.

Canadian Administrators of Volunteer Resources. Standards of Practice. 2001.

"Proof Positive: Volunteer Energy Series". Energize, 1993.

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**TRANSLATION OF MAIN ARTICLE AVAILABLE UPON REQUEST**

## **TO KEEP OR NOT TO KEEP: Best Practices in Record Keeping**

by Diane A. MacFarlane

Record keeping and reporting in volunteer management has evolved from basic data collection on recipe cards to the use of comprehensive information databases. How we collect, use and store information is influenced by changes in the field of volunteer administration, including the development of professional standards, responding to the need for greater organizational fiscal accountability, and utilizing quality assurance data for outcome measurement. Information management also influences our ability to comply with government legislation. With the recent introduction of Canada's Personal Information Protection and Electronic Documents Act (PIPEDA) and existing Provincial privacy laws, volunteer management professionals nationwide are reviewing their record keeping practices and redefining organizational standards for information management.

### **What is "record keeping"?**

Record keeping refers to the entire range of functions involved in creating and managing volunteer records throughout their life cycle. According to the Province of Manitoba Archives record keeping includes :

1. Creating/capturing adequate records - What information do I need from an application form to match the needs of my organization with those of volunteers? Remember: Do not collect information you do not need.
2. Maintaining records in trustworthy record-keeping systems for defined retention periods - Are records kept in a secure locked place?
3. Controlling access according to defined rules - Are passwords assigned to your volunteer management database? Who has access to the information?
4. Disposing of records that are no longer needed, according to formal retention and disposition rules -Do you have a policy on the retention and disposition of volunteer files?
5. Maintaining and providing information about records holdings - Do you have a policy on the retention and disposition of volunteer files?

Under the new laws, are you aware of what you need to keep?

6. Documenting record-keeping practices and actions - Do you have established policy and procedures for what information goes into a volunteer's record?

### **Why keep records?**

Records contain information that is necessary for the day-to-day work of managing volunteers. The primary purpose of the information is to match the needs of the organization with the skills and interests of volunteers. A secondary purpose is to provide reliable evidence of, and information about, "who, what, when, and why" something happened.

The requirement to keep certain records is clearly defined by law, regulation or professional practice. Record-keeping is a matter of policy and good business practice, developed over time and "built into" work processes, to ensure that the organization can comply with national standards of practice and government regulations; produce evidence to avoid dispute or protect against legal liability; draw on evidence of past events to make informed decisions for the present and future; and account for its actions and decisions when required to do so.

### **Legislation and Record-Keeping**

Each province or territory has its own legislation that affects privacy and human rights issues. In Manitoba the Freedom of Information and Protection of Privacy Act (FIPPA) and the Manitoba Human Rights Act has affected what information we keep and how that information is managed. The new Federal Personal Information Protection and Electronic Documents Act (PIPEDA) may also affect some organizations' record keeping policies. Under the new Act, everyone has a new right - each person has the right to dictate how personal information is collected, used and disclosed. Quebec is the only province where provincial legislation must be complied with rather than PIPEDA. In the other provinces with provincial privacy legislation, organizations have to comply with both the provincial and federal legislation. PIPEDA has greater implications than simply confidentiality. A good business practice is to check with your legal counsel as to whether and how PIPEDA may affect your organization. Nevertheless, good record-keeping practices should be 'built into' work processes to ensure compliance with professional, provincial and federal standards and regulations.

Based upon the Canadian Standards Association (CSA) Model Code for the Protection of Personal Information, the Statutory Code of Practice under the Personal Information Protection and Electronic Documents Act (PIPEDA) has ten guiding principles for managing information. How do these effect volunteer

management?

1. Accountability - A public body is responsible for personal information under its control. Organizations responsible for personal information under their control must designate an individual(s) to be accountable for compliance (Privacy Officer) and must implement complaint policies and procedures. As your organization's designate, you are accountable for compliance with these principles.
2. Identifying purposes - The purpose for which personal information is collected shall be identified by the public body before the information is collected. Establish policies and procedures for the collection of information. Review volunteer application forms with your local Human Rights Commission.
3. Consent - The consent of the individual is required except where exempted by law for the collection, use, or disclosure of personal information, except where inappropriate. Review application forms for written consent to contact references and following up on information disclosed. Your application form, website and anywhere you collect information has to have a statement that indicates how you will use the information collected, to whom you will disclose it, and give an 'opt-out' option.
4. Limiting collection - The collection of personal information shall be limited to that which is necessary for the purposes identified by the public body. Information shall be collected by fair and lawful means. Only an individual's name, title or business address or telephone number (business contact information) is not regulated by PIPEDA. Review Human Rights Code for what is lawful and unlawful to collect.
5. Limiting use, disclosure and retention - Personal information shall not be used or disclosed for purposes other than those for which it was collected, except with the consent of the individual or as required or expressly authorized by law. Personal information shall be retained only as long as necessary for the fulfillment of those purposes. Review who has access to volunteer information and establish policies for the retention and disposition of volunteer records.
6. Accuracy - Personal information shall be as accurate, complete and up-to-date as is necessary for the purposes for which it is to be used. Establish policies and procedures for detailing documentation of information on record.
7. Safeguards - safeguards appropriate to the sensitivity of the information shall protect personal information. Determine the specific information that is sensitive to your organization and the appropriate manner for safeguarding the information. Establish policies and procedures for volunteer performance and conduct and the documentation of such records.
8. Openness - A public body shall make readily available to individuals specific information about its policies and practices relating to the management of personal information. Establish policies and procedures for all aspects of

volunteer management, and include key ones in the volunteer's handbook as well as brochures, website and any other program materials, making the information available to all volunteers and staff.

9. **Individual access** - Upon request, an individual shall be informed of the existence, use and disclosure of his or her personal information and shall be given access to that information, except where inappropriate. An individual shall be able to challenge the accuracy and completeness of the information and have it amended as appropriate. Always create records assuming someone will ask to see them. Keep only the final version of your notes. E-mail messages are records; manage them like any other record. Respond to the request as quickly as possible and no later than 30 days after receipt of the request.
10. **Challenging compliance** - An individual shall be able to address a challenge concerning compliance with the above principles to the individual or individuals accountable for the public body's compliance. An organization has to prove their compliance! Under PIPEDA, an employee or volunteer could bring forward a complaint that the Act is not being followed and know this information is safe as PIPEDA has 'whistleblower protection'. Ensure you are familiar with all policies, and that all volunteers and staff receive training on the legislation and your organization's policies and practices to ensure consistency. Remember: Don't write it down unless you are prepared to have it read.

### **Keeping and managing records -**

#### **What's in it for you and your organization?**

Besides complying with provincial and federal legislation, Simon Fraser University suggests there are many reasons for keeping and managing good records. These reasons apply to any volunteer organization collecting and managing information.

#### **1. Access:**

- ♦ Good record keeping makes it easy to locate, retrieve and produce records; poor record keeping leads to frustration and despair.

#### **2. Decision-making:**

- ♦ Complete, accurate, authentic and reliable records support the administration of policy and consistent decision-making, planning, evaluation and reporting.
- ♦ With poor records the original context in which policies, decisions and practices were undertaken is forgotten and the evidence that could be used to review and evaluate them disappears. This contributes to a "re-inventing the wheel" syndrome.
- ♦ Poor record keeping increases the danger that current decisions may be based on out-of-date, inaccurate, and unreliable information.

#### **3. Continuity:**

- ♦ Good records minimize loss of knowledge and ensure business continuity despite staff turnover. Former staff take their memories with them, and without records new staff are unable to fully understand past practices. Memories, moreover, are notoriously unreliable with the passage of time and you need good records to recall your actions and to make good decisions.

#### **4. Efficiency:**

- ♦ Good record keeping increases administrative efficiency and promotes economical operations.
- ♦ Poor record-keeping leads to the unnecessary retention of records long after their value has expired - making useful records difficult to find and taking up valuable office space. Staff time and resources are misspent in labour-intensive searches for records, which for all staff know, may or may not exist, may or may not even have been created.

#### **5. Accountability:**

- ♦ Records are evidence of actions and decisions and provide the means by which people can be held accountable. A public body is responsible for personal information under its control (PIPEDA).

#### **6. Liability:**

- ♦ Well-managed records enable an organization to defend its rights and minimize or eliminate legal liability. An organization should ensure it has the evidence to defend itself in the event of disputes, and be able to accurately reconstruct past events.
- ♦ Records retention and disposal schedules facilitate compliance with applicable statutes. The Freedom of Information and Protection of Privacy Act for example, mandates both the public's right of access to information as well as the organization's obligation to protect privacy and sensitive information from unauthorized collection, access, use, disclosure, and retention.

#### **7. History:**

- ♦ Well-kept records are more easily accessible and ensure a valuable historical accounting of volunteer information.

### **Retention and Disposition of Volunteer Records**

There are no known national standards for the retention and disposition of records for volunteer management. Volunteer Services at the Health Sciences Centre in Winnipeg consulted with colleagues across Canada and took into consideration Human Resource guidelines to develop the following guidelines for the retention and disposition of records.

- ♦ All volunteers who complete an application form are registered and have an electronic and hard copy record.

- ♦ All volunteer applications (hard copy) that did not lead to placement or activation, shall be kept for a period of two years and be scheduled for destruction thereafter. Their electronic file is permanently archived after two years.

- ♦ Active volunteers leaving are made inactive and shall have their record (hard copy) kept for a period of seven years and then scheduled for destruction thereafter. Their electronic record is permanently archived after two years.

- ♦ All volunteer records scheduled for destruction shall be placed in confidential waste for destruction.

It should be noted that, if your volunteer's electronic records are located on the hard drive of your computer, and are being transferred to a new computer, professional assistance should be obtained to ensure that all information on the old computer has indeed been deleted.

### Where To Begin?

Assess your organizational readiness for good record keeping. The time spent on assessing your record keeping for the "who, what, when, and why" will save staff time in the long run. Managing your volunteer information will assist you in coping with changing legislative requirements and trends in volunteer management.

- ♦ What information do you need to make day-to-day decisions in volunteer management? What reasons do you have for collecting personal information?
- ♦ Is all staff following the same procedures for volunteer management record keeping?
- ♦ Have you checked your volunteer application to ensure it meets the Human Rights Code in your Province?
- ♦ Do you have a volunteer records retention and disposal schedule?
- ♦ Do you have the Canadian Administrators of Volunteer Resources' Standards of Practice readily available?
- ♦ What security measures do you have in place to protect the personal information of your volunteers?
- ♦ Have you obtained an informed consent to collect your volunteer's personal information?
- ♦ Do you have a secure locked area or computer system with security systems and limited access to files? Do you have a system where individuals on a "need-to-know" basis access certain files only?
- ♦ Are your policies and procedures readily accessible to your volunteers?

In the Lawyers Weekly, Eve C. Munro and Rachel L. Blumenfeld of Miller Thomson LLP law firm, provide the following advice, "it may be prudent for

charitable and not-for-profit organizations to implement the 10 fair information principles, which are appended to and form part of PIPEDA, to ensure donor and user satisfaction and protect themselves from public complaints". The bottom line is that it is good business practice to keep good records.

- Office of the Privacy Commissioner. <http://www.privcom.gc.ca> Province of Manitoba Archives.

[http://www.gov.mb.ca/chc/archives/gro/recordkeeping/about\\_records.html](http://www.gov.mb.ca/chc/archives/gro/recordkeeping/about_records.html)

- Human Rights Research and Education Centre, Virtual Human Rights Research Library. [http://www.uottawa.ca/hrrec/links/sitescan\\_e.html](http://www.uottawa.ca/hrrec/links/sitescan_e.html)

- Simon Fraser University. <http://www.sfu.ca/archives/what-is-RM.html>

- Canadian Administrators of Volunteer Resources (CAVR)

<http://www.cavr.org>

- Munro, Eve C. and Blumenfeld, Rachel L., The Lawyers Weekly, January 9, 2004 at page 16.

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## ITEMS OF INTEREST

Proof Positive: Developing Significant Volunteer Recordkeeping Systems by Susan J. Ellis and Katherine Noyes Campbell, updated from 1980 and 1990 editions and printed in 2003. It is available through Energize Inc. bookstore at [www.energizeinc.com/bookstore.html](http://www.energizeinc.com/bookstore.html). Proof Positive is a step-by-step guide to designing the forms and organizing the data necessary to manage a volunteer program. The new edition provides advice to help organizations make the most of their computer software programs and/or choose the software that will best meet their needs.

The Human Resources Software Handbook by James G. Meade was printed in 2002 and is available through Jossey-Bass publishing. This book was written specifically for the Human Resources professional who is planning to purchase HR software. It also provides direction on how to determine what organizations would benefit from having HR software.

For information on the Employment Standards Act - Ontario, please call the Ministry of Labour's Employment Standards Information Centre at 416-326-7160 in Toronto, or toll-free in Ontario at 1-800-531-5551 or contact the ministry website at [www.gov.on.ca/lab/mol/esmaile.htm](http://www.gov.on.ca/lab/mol/esmaile.htm)

## HUMAN RESOURCES SOFTWARE

by Kimberley Brereton & Rosa Venuta

Most large organizations, such as the Fortune 500 companies, have Enterprise Resource Planning (ERP) software. Many people are not aware that many of the ERP software vendors are now targeting smaller organizations. For example, SAP now has a Small and Medium Business Unit (SMBU) that has a much broader target group. No matter the size of your organization, you will need people to manage it. Employees are a form of capital. Accordingly, your organization could likely use a form of Human Capital Management software. Did you know that Human Resources forms part of many of the ERP software suites? In fact, if your organization has purchased an ERP, you may have already purchased the Human Resources (HR) component. True ERP software has full integration between all of its components (e.g. Finance, Controlling, Materials Management, Workflow, etc.). This integration implies that there is a single point of data-entry and when the information is entered into the system, all employees who are authorized to access the information are able to do so immediately, i.e. "real-time", over the employee's work life-cycle. This article lists some of the functionality available in the HR software, as well as the advantages of its' implementation.

Some HR vendors are considered to be a "best-of-breed", which as a stand-alone product, they are the industry leaders. Other HR vendors are a part of a larger ERP system that is fully integrated with the rest of the organization. The advantage of a best-of-breed product is that it tends to be less expensive to buy and implement. The disadvantage is it cannot be linked to other parts of the organization unless an interface has been built. Interfaces may cost more money and need to be updated with each upgrade. The larger ERP vendors take more time and money to implement. The advantage of spending the funds at the outset is the "return on investment" past, present and future. The investment in previous ERP implementations can yield further gains as they are integrated and extended to the HR software.

HR Functionality:

### Organizational Management

- a description of all positions (duties, schedules);
- location of as well as links between departments and its positions; and
- status of positions (vacant, filled, key or bench-mark).

### Personnel Administration

- employee work life-cycle;
- personal data (home address, emergency contact information);

- personalized schedules;
- qualifications (interests, language, training, education and expiration dates);
- appraisals (different models and respective due dates for the specified period).

### Time Management

- personalized schedule (weekly/monthly/yearly synopsis);
- availability calendar;
- actual hours worked;
- anniversary date; and
- long-term service recognition programs.

### Personnel Development

- profile match-up between the volunteer's qualifications and the position requirements;
- training proposal generation for missing employee qualifications; and
- career development planning .

### Benefits

- benefit plan enrollment;
- health, dental and savings benefit plans; and
- integration to external providers if desired.

### Payroll

- payroll wage type payments/deductions;
- gross and net payroll; and
- regular legal change patches provided by the vendor to ensure legal compliance.

### Configuration

The HR software can be customized to meet the organization's needs. Be aware that too much customization will lead to system modifications, which are not necessarily supported by the vendor during an upgrade process. It is advisable to prepare extensive documentation on any and all system configuration.

### Important advantages of HR software:

- enhanced reporting abilities;
- position and salary management;
- job evaluation - Hay Pay Net, National Occupation Classification codes;
- Employment Equity Act compliancy - legislated reporting requirements;
- time management - overtime, vacation and sick leave quotas;
- compensation management - personnel cost planning scenarios;
- payroll - deductions, garnishments, Canadian taxation compliancy;
- travel management (expense management and travel privileges);
- integration to Payroll and the Finance/Controlling Departments;
- workflow - automated business processes;

- workflow - automated business processes; and
- Employee Self-Service via the organization's intranet/internet.

This last advantage, Employee Self-Service (ESS) is key in reducing the amount of administration and costs, which HR is responsible for. Employees are empowered to maintain their own mailing address, emergency contacts, beneficiaries, banking information, expense claims, qualifications and more.

### **Conclusion**

While the smaller vendors are less expensive, they will be more limited in their benefit to the organization as a whole. The larger vendors offer a substantially more sophisticated and comprehensive HR database software. A cost-benefit analysis should be completed to best understand what type of vendor is bestsuited for your organization. Some of the vendors even have on-line surveys that will assist you in such an endeavour. Good luck!

*Kimberly Brereton is a Human Resources Consultant for SAP Canada Inc. and Rosa Venuta is Team Lead, Governance Unit, Canadian Institutes of Health Research in Ottawa.*

## **VOLUNTEERS AND RECORD KEEPING**

by Mary T. Satterfield

There are certain legal issues that are of special importance to volunteers and their supervisors when it comes to record keeping. In this computerized age, it seems so easy to record a great deal of information. New forms and checklists are being developed almost daily to record almost everything. Therein lies the problem!

Most volunteers work in situations where there is some requirement to maintain privacy and confidentiality of information. Others work with people who are minors, or elderly, or suffer from some degree of disability. How then can confidentiality of information be maintained in the face of computers and proliferating information systems?

There is also the spectre of records having to be disclosed under court subpoena in a criminal, custody, child welfare or other proceeding. In that case, unless a lawyer can convince the court otherwise, they must be disclosed.

Finally, there is the Privacy Act. No simple, definitive answers exist but there are certain questions for managers of volunteer resources, from which their own guidelines can be developed.

1. How does the Privacy Act pertain in their particular service or agency?
2. What information is essential to volunteers in order to do their job?
3. Beyond identifying information, what else is needed or desirable?
4. Thereafter, what is recorded and why?
5. Is the form used appropriate?
6. How is information stored and safeguarded? Who has access to it?
7. Are volunteers supervised about privacy and confidentiality?
8. How long is information retained and why?
9. What is the policy about destruction of information?

Managers of volunteer resources would benefit enormously from consulting with their own legal advisors about record keeping in their own agencies or services. If the organization has a human resources department they should also be consulted to see if policies that pertain to paid staff could be applied to volunteers.

*Mary Satterfield, Barrister and Solicitor, has a Master of Social Work degree, an LL.B. from Osgoode Hall Law School and extensive mediation and arbitration training. She is the co-author of: "Law for Social Workers: A Canadian Guide" and "Law for Volunteers: A Guide". She practices family and estates law in Toronto.*

### **NEWS BITS**

#### **Sending Kids To Camp ...**

Tim Hortons annual Camp Day fundraiser raised \$6 million this year to help send kids to camp.

This year camp day was held on June 9th. 2,300 Tim Hortons stores across Canada and more than 180 stores in the United States donated 100% of their coffee proceeds to the Tim Horton Children's Foundation.

The amount exceeds last year's Camp Day total by \$500,000.

For more information, visit: [www.timhortons.com](http://www.timhortons.com).

## WHAT INFLUENCES THE USE AND EFFECTIVENESS OF INFORMATION AND COMMUNICATIONS TECHNOLOGY?

by Yvonne Harrison

This is the kind of question University of Victoria's School of Public Administration researchers Yvonne Harrison, Vic Murray and James MacGregor wanted to investigate when they assessed what kinds of factors (organizational, social-individual or technological) were associated with the use and perceived effectiveness of Information and Communications Technology (ICT) applications in a wide sample of 462 diverse Canadian volunteer programs.

Their report, *Beyond Anecdotes: The Impact of ICT on the Management of Volunteer Programs in Canada*, examines the relationship between these three broad sets of factors and the ICT choices of managers of volunteer resources (MVRs). They also examined managers' perceptions of the effectiveness of ICT in enhancing volunteering and volunteer programs.

A number of different ICT applications were examined, including e-mail, an online recruitment system (the Volunteer Opportunities Exchange-VOE) and organizational websites. Several measures of the effectiveness of ICT were employed, including the impact of ICT on volunteer recruitment; and the overall cost, productivity, efficiency, effectiveness and service quality of volunteer programs.

A summary of the results reveals that different types of factors were associated with different patterns of ICT use and effectiveness.

For patterns of ICT use:

- ♦ The greatest predictor of volunteer program website capability (level of "e-connectivity") was the amount of money volunteer programs had invested in ICT. The more money invested, the more "connectivity" volunteer program websites had.
- ♦ Higher levels of perceived stress in the job environment were associated with lower use of e-mail for organizational purposes.
- ♦ Managers, who spent more time using ICT in their work generally, were also more likely to have used e-mail to manage volunteers.
- ♦ MVRs who had positive attitudes toward ICT were much more likely to be early adopters of the VOE online system to recruit volunteers.

For ICT effectiveness:

- ♦ The greatest influence on the perceived effectiveness of ICT on the

volunteer program was the amount of time managers spend using ICT in their work.

- ♦ For impacts specific to the use of the VOE online recruitment system, they found that attitudes or the expectation that the VOE was useful was the greatest predictor of its perceived effectiveness.

So, what does this research tell us about what MVRs should consider when thinking about the use and effectiveness of ICT applications in their work?

- ♦ Different types of factors at different levels of analysis influence different uses of ICT and effectiveness patterns.
- ♦ Focusing on the technology itself, or the immediate environment in which it is used, may be short sighted.
- ♦ Time and money are important predictors of different ICT use and effectiveness patterns.
- ♦ Successful implementation and use of ICT may require ongoing commitment and investment of resources.
- ♦ To be used effectively, ICT has to be seen to be useful or have "lived up" to attitudes and expectations.
- ♦ Job stress may interfere with technology use.

Overall, strategies that target these types of factors can be expected to have a positive influence on the use and effectiveness of ICT in enhancing volunteer programs.

To view a copy of this report, sponsored by the Canadian Centre for Philanthropy, please visit the "Information Resources and Tools" section of the Knowledge Development Network website at [www.kdc-cdc.ca](http://www.kdc-cdc.ca).

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## PERSPECTIVE OF A SOFTWARE DESIGNER

by Susan and Dan Wagener

As the 21st Century gets underway, personal computer software for volunteer coordinators comes-of-age and a new breed of technology with exciting potential is on the horizon. These technologies can really help volunteer coordinators in many ways, not just with recordkeeping.

Besides the standard office productivity tools like Microsoft Office (which are a must for basic office work), software developed specifically for volunteer coordinators is now in wide use, helping with a variety of tasks. In addition to keeping track of who volunteers, these programs can perform more advanced functions like recruiting, application processing, scheduling, managing recognition and monitoring the completion of requirements such as health-screening.

Tracking volunteer service is one-way technology can have a big impact. Tools are now readily available for collecting volunteer service information on-site through touch-screen kiosks or on-line through the Internet. This means volunteers can sign-in and out when they arrive for duty or post their own service information from home over the Internet and have their service information go directly into a database. From here, your database can do the work. You can easily produce printed volunteer service reports, sort volunteer hours by service area, location, volunteer or volunteer category (such as adults or juniors). It is also easy to compute the value of volunteer service or make comparisons to the number of full-time workers it would have taken to produce the same results.

E-mail is another reason for using a volunteer database program. E-mail is a fast, inexpensive way to communicate and recruit. Keeping your volunteer e-mail addresses in your e-mail program (Outlook for example) is adequate, but it does not offer you an easy way to do targeted mailings. This is another way a good volunteer database program helps. Suppose you need to recruit volunteers for weekend openings in a particular service area. With a database, you can easily direct your e-mail to those who serve or are interested in that service area and who are known to be available weekends. By sending well-targeted e-mail you avoid overwhelming e-mail recipients with messages that do not concern them. Your messages carry greater importance.

Software for volunteer coordinators that you load onto your computer has been around for a while, but there is a new breed of service you should keep an eye on. These services that run over the Internet are designed specifically for volunteer leaders. Known as 'hosted applications', these services eliminate the

need for you to install any software, letting you work from virtually anywhere. Most importantly, they open the door to some exciting opportunities for everyone involved in your effort to collaborate on-line as a community. Volunteers can participate by seeing volunteer openings in real-time, checking their schedules, entering changes to their e-mail address, postal address, or phone numbers, updating their interest and availability profiles and more. Assignment level supervisors can join in by managing the volunteer schedules for their area and posting volunteer service information.

Determining what technology is best for you involves some homework but the results can pay off. Make a list of the things you would like to accomplish. Talk to colleagues about what has worked for them. Look for free or low cost trial systems so you can try before you buy. With a good plan and the right tools today's technology can help you build and maintain a successful volunteer effort.

For further information on Volunteer Works database program, contact Susan and Dan Wagener at Red Ridge Software Co. [sales@redridge.com](mailto:sales@redridge.com) or visit their website at [www.redridge.com](http://www.redridge.com).

## PEER EXPERTS

### Scenario:

*I know how important it is to keep records, but as with all things, time and money are the big issues in my work reality. Keeping up with technology is a challenge in my organization, and for me personally. But paper files take space, and that's at a premium too! I'm not even sure what, of all of the information one gathers about programs and volunteers, it is most important to keep. So in a nutshell, can you give me any tips about what to keep and how to store it?*

### Response:

Records management is probably among the lowest priority activities on our daily "to do" list. In this age of information overload, it is worth taking the time and effort to develop some policy and procedures around what is to be kept, for how long, and in what form. The daily requirements of doing business and current legislation make a certain amount of record keeping necessary.

Canada has recently legislated the "Personal Information Protection and Electronic Documents" Act (PIPEDA). This Act includes a "Code for the Protection of Personal Information", which contains 10 principles of fair information practices. Developed under the auspices of the Canadian Standards Association, these 10 principles form the ground rules for the collection, use and disclosure of personal information.

You mention that you are challenged by today's technology, but I gather that your employer does use a certain amount of technology for record keeping. There are a number of excellent web sites available, and I would refer you particularly to: [www.axi.ca](http://www.axi.ca), Go to: Resources, then: Reports and Publications; there you will be able to find a document called "The PIPEDA Privacy Principles - A Guide for Associations and Non-Profit Organizations". This handy guide outlines the 10 Principles and includes detailed information about consent, disclosure and retention. For each of the 10 Principles, "Your Organization's Responsibilities" are outlined with guidelines on how to fulfill them. Best of all, though, are the "tips" and "appendices", easy checklists and ideas designed to streamline the record keeping process for the non profit sector while adhering to the legislation. A wealth of additional information about the Act, and record keeping can also be found at: <http://www.acjnet.org/privacy.cfm>

This will tell you "what to keep", but the decision about "how to keep it" must remain with you. As I said, it is important to develop Policy and Procedures around information retention. Your Board is there for you. Why don't you develop a draft records retention policy and propose it to them? Include an overview of stats you may have kept over the years; how many volunteers are active, how many have left, how frequent are the departures, do they tend to return, and how regular is the intake of new volunteers. Define the makeup of a volunteer file - what's in there? Make sure you are adhering to the PIPEDA Act! If you can keep the amount of information collected to a minimum, you will reduce the cost of collection, storage and archiving of data. This should impress the Board.

Propose a policy that you can live with...one that, for example, dictates the length of time hard files (manila folders) are kept on volunteers who resign versus volunteers who are dismissed versus volunteers who "melt away" without a word of goodbye! Your policy could indicate at which point only a soft copy (computer) record of the volunteer need be kept, what it will contain, and when (if ever) it will be deleted. The fields in your computer data base should be limited to those pieces of information that a) are legal to keep, b) can be used to generate a mailing list and c) are required for statistical sorting. Be aware that comments of a personal nature should not be kept on record (ex: "loser"), but there are ways of triggering your memory about incidents and episodes you feel that you might need to recall. (ex: see telephone reference form).

A final piece of advice that I would offer is a trick that I find invaluable: make a check list for yourself of the record keeping procedures that you follow at every step of the volunteer process. Follow it, and don't assume that you can

process a volunteer without double-checking the list. Here's an excerpt from my list:

#### **Screening:**

- Ensure applicant has selected an approved assignment.
- Enter applicant information in "waiting" section of database. (Fields are: name, address, 2-3 telephone numbers, e-mail address, gender, date applied, date started, date of birth, how they heard of the opportunity, supervisor, site, assignment, certificates achieved, end date, reason for leaving, comments).
- Review application: check D.O.Bs, verify letters of reference, and forward it to the Intelligence section for police records check.
- Send letter of "Confirmation of receipt" to applicant
- Copy and retain one copy of all.
- Review results of police records check. If the decision is made to proceed, cover letter and copy of application is sent to Sworn Officer (site supervisor if applicable) for character reference checks by telephone.
- Add to list of volunteers awaiting interviews.
- If the recommendation is not to proceed, notify the applicant.

#### **Engagement:**

- If the recommendation is to proceed, amend data base to reflect volunteer's "active" status;
- Remove from list of volunteers awaiting interviews;
- Assign volunteer number;
- Notify site supervisor and volunteer of ID tag and fingerprinting procedure;
- Notify building security of new tag issued;
- Activate volunteer's email address if applicable;
- Forward Quick Reference Guide (volunteer manual) to Volunteer; and
- Ensure supervisor orders Golf Shirt.

#### **Recognition:**

- Ensure recognition process is maintained database.

#### **Departure:**

- Move from Active to Inactive section of database;
- Remove from e-mail list;
- Cancel ID tag. Notify building security;
- Re-file hard file;
- If applicable, generate certificate and letter; and
- Forward Exit Interview questionnaire to former volunteer either electronically or by Canada Post with cover letter and retain response.

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## Response #2:

No matter how big or small your organization, or how many volunteers you have, record keeping is a key element to any successful volunteer department. Record keeping ties into planning, recruitment, interviewing, screening and evaluating your program. All of these elements require careful tracking of the volunteer management processes.

Current volunteer files and an organized system ensure that you know who is volunteering for your organization and supports long-term sustainability.

In the past few years, the topic of outcome measurement has come to the forefront in not-for profit management. While statistical program information has traditionally been the focus of our reporting, more and more, funders want to know how managers of volunteers are measuring the scope, value and impact of volunteers in organizations. Sustainability of a developed or developing volunteer department is another important reason to keep track of your actions. If a manager of volunteers were to hypothetically win the lottery tomorrow and leave the organization, could someone step into the organization and know where things stand? How many volunteers does the organization have? Which volunteers are active? When was the last time the volunteers were evaluated and appreciated? The 'lottery syndrome' highlights the element of sustainability where all employees of an organization are to be held accountable. As a manager of volunteers, it is our responsibility to uphold and sustain the work we are doing with our volunteers. It is also a way to position ourselves as leaders in our organizations. Volunteer department history places value on volunteers and on the position of manager of volunteers. Promoting leadership through the management of our departments is one way the manager of volunteers can become more involved in the strategic planning and success of a not-for-profit organization. Setting an example by keeping accurate records and discussing what records are kept, why and how, with other employees and volunteers will enhance the sustainability of the organization over a period of time and change.

Time and money are at a premium in every organization. There always seems to be some pressing matter we must get to, before we deal with keeping our files in order. We must either make the time in our day to record what we have decided is imperative to our operations or set aside time at the end of the week or month to file, enter information into our database or check references.

If you are already struggling with organizational and time management aspects of your job, you may wish to solicit the assistance of an administrative volunteer within your organization, or recruit a new volunteer after you have created an appropriate job description. Seasoned managers of volunteers will be able to use this opportunity to mentor a volunteer interested in either

working for the organization or becoming a manager of volunteers. The biggest challenge in involving a volunteer to assist you with keeping your records will of course be finding the right personality who will pay attention to detail, have superior organizational skills and the desire to assist in moving the volunteer department forward.

If you choose to use the route of a volunteer to help you with your records, be sure to recruit strategically and plan which elements of record keeping you will assign. Keep privacy legislation and issues in mind. For example, it is not recommended to have a volunteer do your police records checks, reference checks or the collection of any information that may be deemed personal information. For more information on PIPEDA, please visit: [http://www.privcom.gc.ca/legislation/02\\_06\\_01\\_01\\_e.asp](http://www.privcom.gc.ca/legislation/02_06_01_01_e.asp)

The risk management factor of the files kept with a manager of volunteers leads to the question of what records one should keep. The most common record kept is the initial application form, in which one can ask for:

- Contact information;
- Month and day of birth;
- Occupation;
- Volunteer opportunity for which the person is applying;
- Emergency contact information;
- Availability; and
- Start date.

Remember, the volunteer has the option to decline providing any of the information. If something such as a birthday is requested and then declined, you may wish to share the reason you are requesting the information, such as recognition of volunteers through birthday cards. You do not need to know the year the volunteer was born.

Other information a manager of volunteers keeps include:

- A screening process checklist (designed by you, for your organization);
- Interview notes, including outcomes;
- Police records check;
- Reference check notes;
- Declarations and waivers, such as confidentiality or photo releases;
- Volunteer commitment contracts;
- A signed job description;
- Record of training and orientation completed;
- Record of incidents or discipline;
- Record of recognition received;
- Time sheets;

- Exit interviews; and
- End dates and reason for leaving.

Remember, the volunteer has the right to review what is his or her file. When taking any notes in any of the above processes, be sure that the notes are taken in a way that would be presentable to the viewer.

According to the Canadian Code for Volunteer Involvement's Organizational Standards checklist, all volunteer records "are kept for each volunteer using a confidential, secure system". It is preferred that the volunteer files be kept in the office or workstation of the manager of volunteers in a locked filing cabinet. You have the responsibility to protect the privacy of your volunteers.

Databases are a great tool for managing and retrieving volunteer information quickly. They are useful for mail merges, e-mail communications that need to be relayed quickly to volunteers, recognition and virtual volunteer opportunities and commitments. A manager of volunteers in the market for an organizational product will research the type of database software that may be necessary for the organization and its volunteers. Take into consideration the size of your volunteer department, what information you intend to keep electronically and the budget you have for technology and maintenance. A database is only as good as the information you put in it. Some options of volunteer database software to research include:

- Volunteer Coordinator 2004, [www.infosoft.ca](http://www.infosoft.ca)
- Volunteer Works, [www.redridge.com](http://www.redridge.com)

If you have a smaller number of volunteers or a smaller budget, consider Excel, Access, or potentially using a custom-designed database. Database design is a fantastic volunteer opportunity, especially if you are in a larger city where people are looking for that type of volunteer experience for their resumes. Paper files provide us with a back up of our records; they are not to be entirely replaced by technology.

Every manager of volunteers will have their own unique ways of storing records. My biggest recommendation to those asking for tips is to be consistent with the records you've decided to keep on your volunteers. It is also recommended that you have policies on how you keep your records and for how long. The Freedom of Information and Protection Act (FOIP) in Alberta reminds us that we are not to be keeping personal information on people if we are not using that information. While you may be taking the steps to manage risk and successfully run your program, if you do not have your records in order, you have no sustainability or history of how far you've come. Well-kept records are like a clean house. If you start with an orderly house and maintain it on a regular basis, others that live in it and future occupants will respect its value and contribute to its order.

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## **VOLUNTEER MANAGEMENT SOFTWARE REVIEW**

by Justin Ho

Sometimes tracking volunteer hours and schedules can be done with just a pen and paper. Sometimes you can make do with a few Microsoft Word documents and an Excel spreadsheet. Many times, however, managing a volunteer program can be so much easier with a dedicated software program.

There are a number of software programs on the market aimed at helping you manage your volunteer program information. The following is a sampling of some of the options. Please note that the details provided are for information purposes only and do not constitute an endorsement by the Canadian Journal of Volunteer Resources Management.

### **NFP ToolKit -**

([www.nfptoolkit.com](http://www.nfptoolkit.com))

By Burlington, Ontario based Affirmative Technologies, the Not-For-Profit Toolkit is a web-based tool, where staff and volunteers can access and input information through the Internet. Because the NFP Toolkit is accessed from the Internet, data for the software is stored securely (and backed up) on servers and therefore not housed in your own computer's hard drive.

### **Volunteer Coordinator 2004 -**

([www.infosoft.ca](http://www.infosoft.ca))

By Calgary-based Infosoft, Volunteer Coordinator 2004 desktop software (i.e. the program is installed onto your own computer) maintains volunteer contact information, schedules volunteers and has 40 reporting options. Infosoft also offers Event Manager 2004, software specific for festivals and events.

### **VolunteerWorks -**

([www.redridge.com](http://www.redridge.com))

By RedRidge Software, VolunteerWorks is a well-established desktop software program. It tracks volunteer assignments, hours, training, recognition, and more. RedRidge also offers VolunteerTools, which links VolunteerWorks to an organization's website, offering a number of online tools, including applications forms and time sheets.

### **Coordinator -**

(www.samaritan.com)

By Samaritan Technologies, Coordinator is a desktop software program that provides searchable, reportable, user defined fields, email, scheduling, reports, mailing labels, and custom surveys. Samaritan Technologies also offers eCoordinator, which is a web-based version of Coordinator.

### **Volunteer Reporter -**

(www.volsoft.com)

By Volunteer Software, Volunteer Reporter is specifically designed to meet the needs of hospitals, Senior Corps programs, volunteer centers, schools, museums, and not-for-profits. Some key features include: scheduling, time sheets, skills banks, merge files, customizable reports and spreadsheets.

### **Income Manager v.5.1 -**

(www.incomemanager.net)

Income Manager is a Canadian product that tracks all the resources that come into an organization, from donors, to revenues to volunteers. Although not a software program dedicated solely to managing volunteer programs, it provides basic volunteer management tools within a larger resource management context.

*Justin Ho is the VOE (Volunteer Opportunities Exchange) Administrator for Volunteer Canada. Justin lives in Vancouver and can be contacted at: jho@volunteer.ca*

## **SEARCHING FOR STORIES ...**

Has a volunteer done something funny while volunteering with you?

Do they keep the workplace a fun environment?

We are looking for funny volunteer experiences that you may have encountered while managing volunteers.

If you have a story or anecdote, share it with us!

All stories will be published in our next issue

'Humour in Managing Volunteer Resources'.

# JOURNAL OF VOLUNTEER RESOURCES MANAGEMENT

Editorial Process and Guidelines for Authors

## Objective

The Journal of Volunteer Resources Management is intended:

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

## Target Audience

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

## Submissions

All manuscripts will be accepted on diskette or via e-mail in either Microsoft Word or Word Perfect. Submissions should be written according to "Canadian Style - A Guide to Writing and Editing" - Secretary of State, Dundurn Press. External reviewers may be engaged to review content if deemed advisable by the committee.

The revised draft is edited for clarity and consistency by the Editorial Team.

The edited version is returned to the author for acceptance along with an approval form for signature.

The signed form is to be returned to the Editorial Team within a week along with any suggestions for final revisions.

## Format and Style

Authors are asked to respect the following word counts:

	Words	Pages
<b>Lead Article</b>	2000	5-6
<b>Secondary Article</b>	700-800	2-3
<b>Book Review</b>	150	1

The lead article will look at the topic in some depth and will normally require the author to conduct research into current trends and perspectives on the subject.

The secondary article will adopt a more practical approach, including personal experiences and opinions.

## Advertising

Limited advertising space will be allowed in the Journal, for materials of direct relevance to managers of volunteer service, and as long as it conforms to the guidelines set out by the Editorial Team.

## Guidelines:

1. Only ¼ page and ½ page ads will be accepted.
2. Ad must be camera-ready.
3. A maximum of one page of ads will be permitted per issue.
4. Job ads are not recommended.
5. Cost is to be determined by the Editorial Team.

## LOOKING AHEAD

July 9-10, 2004

**COI Symposium - "Facing Current Realities: New Knowledge in the Canadian Voluntary Sector"**

Ryerson University, Toronto  
admin@cvsrd.org

August, 2004  
**(IAVE) World Volunteer Conference**  
Barcelona, Spain

October 20-23, 2004

**Association for Volunteer Administration (AVA) Conference**  
Portland, Oregon  
info@AVaintl.org

Click on the following websites if you want either more information or to become a member of: PAVR-O [www.pavro.on.ca](http://www.pavro.on.ca) or CAVR [www.cavr.org](http://www.cavr.org)

## DEADLINES FOR SUBMISSIONS & THEMES

Issue	Deadline	Theme
Summer'04	articles due on the 24th of May	Humour in Managing Volunteer Resources
Fall'04	articles due on the 24th of August	Outcome Measurement
Winter '05	articles due on the 24th of October	Volunteers in Leadership Roles
Spring '05	articles due on the 24th of May	Managing Difficult Volunteers