

STATEMENT of POLICY and PROCEDURE			
Manual:	O'KEEFE RANCH AND INTERIOR HERITAGE SOCIETY	OKR No.	5.04
Section:	Human Resources	Approved	May 24, 2018
Subject:	Volunteer Management	Amended	
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1 POLICY

- 1.01 O'Keefe Ranch and Interior Heritage Society recognizes and values the contribution made to it by its volunteers, and is committed to providing volunteers with opportunities for involvement, safe working conditions and recognition for their help.
- 1.02 Volunteers are not employees. The policies pertaining to volunteer assignments are contained in this policy.
- 1.03 All volunteers are expected to behave in a manner that is legal, ethical, free from conflict of interest, respectful of others and free from harassment. Volunteers who do not behave in this way will be subject to reassignment or dismissal.
- 1.04 All volunteers are expected to respect the standards of O'KEEFE RANCH AND INTERIOR HERITAGE SOCIETY with respect to scheduled hours, modes of dress, use of appropriate language, adherence to policies and use of business equipment for business purposes. Volunteers who do not respect these standards may be dismissed.
- 1.05 All volunteers have the right to be treated with respect in an environment free from harassment. Volunteers who believe they are being subjected to harassment have the right to appeal to their supervisor and/or the Operations Director
- 1.06 Volunteers whose assignments will involve working directly with clients or cash are required to arrange for a police check at their own expense before they may be assigned. Results of police checks will be kept confidential to the Operations Director, the volunteer's supervisor and the President, but will be retained in the volunteer's file for the duration of the volunteer's assignment and for six years thereafter.
- 1.07 O'KEEFE RANCH AND INTERIOR HERITAGE SOCIETY will maintain a volunteer file containing application information, police record check if applicable, emergency contact information and up to three years of written performance assessments. A volunteer is welcome to review the contents of their file at any time mutually agreeable to the Operations Director and the volunteer.

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- 1.08 Unless excepted by the Operations Director, all new volunteers will undergo a trial period during the first three months of their volunteer assignment. Volunteers who demonstrate inability or unwillingness to adhere to the standards of O'Keefe Ranch and Interior Heritage Society policies at any time in the trial period will be asked to leave.
- 1.09 New volunteers will be provided with orientation to the organization, access to this and other relevant policies and any training required for their particular volunteer assignment.
- 1.10 Annually, the Operations Director is required to produce and review with volunteers written assessments of volunteer performance and contribution, as well as skills and potential. Volunteer assessment reports will become part of the volunteer record for a period of no less than three years.
- 1.11 O'KEEFE RANCH AND INTERIOR HERITAGE SOCIETY recognizes that some volunteers welcome the opportunity to develop new skills and obtain working experience through their volunteer assignments. Volunteers who wish to be considered for an alternative volunteer assignment may make this request of their supervisor and the Operations Director. While not all requests may be met, the organization will make every effort to find an appropriate assignment.
- 1.12 O'KEEFE RANCH AND INTERIOR HERITAGE SOCIETY recognizes that some volunteers may be interested in exploring paid employment opportunities here. Volunteers are eligible to apply for any job opportunities available externally.
- 1.13 O'KEEFE RANCH AND INTERIOR HERITAGE SOCIETY engages in both formal and informal volunteer recognition. A volunteer not wishing to be recognized formally is requested to make this known to the Volunteer Coordinator.

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2 PURPOSE

- 2.01 The purpose of this Statement of Policy and Procedure is to state organizational expectations with respect to volunteer behaviour and to provide guidelines for volunteers.

3 SCOPE

- 3.01 This policy applies to all volunteers, supervisors of volunteers, the Volunteer Coordinator and the Operations Director

4 RESPONSIBILITY

- 4.01 It is the responsibility of the volunteer to understand and adhere to organizational expectations with respect to behaviour and performance.
- 4.02 It is the responsibility of the Volunteer Coordinator to train volunteers for their assignments, provide links between the organization and the volunteer and to ensure that individual volunteer assessment reports are produced annually.
- 4.03 It is the responsibility of the Volunteer Coordinator to recruit, select and provide orientation to volunteers for the organization and to maintain volunteer records.
- 4.04 It is the joint responsibility of the Operation Director and the Volunteer Coordinator to assess the volunteer during their trial period and provide feedback to the volunteer.
- 4.05 It is the responsibility of the Volunteer Coordinator and HR Committee to maintain visibility of the collective contribution of volunteers to the organization and to arrange for formal volunteer recognition mechanisms.
- 4.06 It is the responsibility of the Operations Director to ensure that supervisors of volunteers understand their responsibilities to their volunteers.

5 DEFINITIONS

None

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6 REFERENCES and RELATED STATEMENTS of POLICY and PROCEDURE

- OKR Policy 2.04 – Ethics
- OKR Policy 2.05 – Risk Management
- OKR Policy 5.01 – Human Resources Primer
- OKR Policy 5.02 – Recruitment, Selection and Orientation

7 PROCEDURES

7.01 Volunteer Management Plan and Budget

- (a) As part of business planning activities, the Operations Director will consult with managers and produce a volunteer management plan for the coming period including:
 - (i) Volunteer recruitment requirements.
 - (ii) Volunteer reassignment requirements.
 - (iii) Volunteer appreciation and recognition plans.
 - (iv) Volunteer orientation and training plans.
- (b) These plans will be reviewed and approved by the President in conjunction with the budgetary requirements for the volunteer management program.

7.02 Volunteer Application and Checks

- (a) All prospective volunteers are required to complete a volunteer application form containing:
 - (i) Name.
 - (ii) Contact information.
 - (iii) Preferred numbers of hours.
 - (iv) Hours of availability.
 - (v) Relevant skills and experience.
 - (vi) Preferences for type of assignment.
 - (vii) Willingness to undertake a police record check if applicable.
 - (viii) Permission for the organization to retain this information on file.
 - (ix) One to three references.
- (b) The Volunteer Coordinator will make assignment matches for recruited volunteers only after receiving a completed application, performing an interview, confirming the police record check if applicable and performing a reference check.

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- (c) The Volunteer Coordinator may elect to forego any one of these steps in circumstances for short-term assignments where the risk to the organization is minimal.

7.03 **Assignment, Orientation and Training**

- (a) The Volunteer Coordinator will assign the volunteer to a task and provide the volunteer with an organizational orientation including:
- (i) Volunteer management policy.
 - (ii) Code of Ethics.
 - (iii) Organizational expectations with respect to dress, behaviour, attitudes, language and use of organizational resources.
 - (iv) Organizational structure.
 - (v) Safety practices.
 - (vi) Work that may not be done by a volunteer.
 - (vii) Work location.
 - (viii) Name and contact information for supervisor.
- (b) Orientation sessions may be undertaken on the group basis periodically if numbers dictate.
- (c) At the time of orientation, volunteers will be asked to provide emergency contact information, and to sign a checklist indicating that they have received orientation in ethics, organizational expectations, policies, safety practices and the volunteer management policy.
- (d) Following orientation, the volunteer will report to their supervisor for assignment-specific training.

7.04 **Trial Period and Performance Assessment**

- (a) Unless excepted by the Operations Director the volunteer will undergo a three-month trial period on their volunteer assignment. During this three month period, the supervisor is expected to provide the volunteer with additional coaching, correction or other feedback which may be required to reinforce expected behaviour and performance.
- (b) If the volunteer's performance does not meet requirements, the supervisor may refer the volunteer back to Volunteer Coordinator who may choose to arrange for reassignment or dismissal.
- (c) At the end of the trial period, the volunteer's supervisor will report to the Volunteer Coordinator on the performance of the volunteer and the appropriateness of the assignment match.

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- (d) At the end of the trial period, the volunteer's supervisor will also provide an opportunity for the volunteer to express any opinions or concerns about their volunteer assignment and will attempt to make reasonable adjustments in response. The volunteer also has the option at this time to request an alternate assignment. Reassignments will be subject to availability and the judgment of the Volunteer Coordinator.
- (e) Annually thereafter, the supervisor will provide the volunteer with a short written assessment of their performance and contribution. A copy of the supervisor's assessment will be kept on file for three years.

7.05 Opportunity for Paid Employment

- (a) At the time of O'KEEFE RANCH AND INTERIOR HERITAGE SOCIETY extends its search beyond the current employee base, volunteers are welcome to submit their application for these opportunities.
- (b) While volunteer experience with of O'KEEFE RANCH AND INTERIOR HERITAGE SOCIETY is an asset on any application, volunteers will not receive preferred treatment in the filling of employment opportunities, but will be expected to compete with all candidates fairly.

7.06 Notice

- (a) The organization will attempt to provide the volunteer with as much notice as possible of a reassignment or dismissal.
- (b) Volunteers are expected to provide the organization with as much notice as possible of any change to their circumstances which will affect their ability to fulfil their volunteer commitments.

7.07 Recognition

- (a) Periodically, the Volunteer Coordinator will remind supervisors of volunteers of the value that volunteers bring to the organization. Supervisors are expected to find informal ways of expressing appreciation or recognizing their volunteers in a manner that will be most meaningful to them.
- (b) The Volunteer Coordinator and or HR Committee will also arrange for formal volunteer recognition mechanisms including some or all of:
 - (i) Letter of acknowledgement from the President or Board of Directors.
 - (ii) Certificate of appreciation.
 - (iii) Volunteer recognition in the newsletter.
 - (iv) Volunteer appreciation week event.