

# University of British Columbia

## A Guide to Developing and Managing a Successful Volunteer Program

### Introduction and Purpose

Individuals volunteering their time and expertise to the University of British Columbia (the “University” or “UBC”) provide an important service to UBC, helping the University further its mission of teaching, research and public service. In turn, volunteers obtain valuable work and social experiences as well as acquire a sense of personal achievement and satisfaction.

Volunteers often bring a unique background, perspective, and energy that benefits everyone involved. UBC departments and faculties rely upon the services of many volunteers each year. The [Department of Human Resources](#) recommends that UBC departments and faculties carefully plan, structure, and implement detailed volunteer programs in order to best incorporate this valuable resource.

These guidelines are intended to promote a productive, enjoyable, and mutually beneficial environment for both volunteers and departments by outlining the respective expectations, roles, and responsibilities. If you have any questions about issues related to volunteerism, please contact your HR Advisor.

### A. Elements of the Successful Volunteer Program

An effective volunteer program has the following five elements:

1. Planning;
2. Recruitment, Interviewing & Screening;
3. Orientation & Training;
4. Supervision & Evaluation; and
5. Recognition

Each of these interrelated elements will be discussed more thoroughly below.

### 1. Planning

Planning is essential for the success of any volunteer program and involves:

- ensuring senior-level support for the volunteer program;
- clear design of volunteer positions and assignments;
- tailoring an appropriate application form;
- developing applicable policies and procedures;
- assessing risk and implementing risk-management strategies; and
- consideration of the unionized environment at UBC.

Building on the support of a department’s or unit’s supervisors can greatly benefit a volunteer program. Supervisors can help facilitate budgets, organize workspace and equipment, ensure appropriate insurance policies, and provide an important evaluation for the overall program.

Each volunteer position should have a corresponding volunteer assignment that outlines the parameters and responsibilities of the position, the level of required commitment, and any qualifications, training or equipment required for its successful implementation. A discussion on developing volunteer assignments is provided on page 4.

Volunteer application forms should be written to outline the specific requirements of the position and list any requisite information. Avoid requesting information that is irrelevant to the position. For example, one would request different information for a single day event than that for a full academic term. Please see page 5 for a further discussion on application forms.

Consideration must also be given to the development of applicable policies and procedures related to the volunteer assignment. Ask the following questions: who should a volunteer contact if they are unable to attend their assignment? What practices should be followed if volunteers work with minors (under 19 years)? How should expenses be reimbursed and which expenses are valid (have a discussion with your department financial advisor)? Who can use UBC vehicles? How does one report an accident?

Another related area to consider is liability and accident insurance. Contact [Risk Management Services](#) to determine whether the Volunteer Accident Insurance is applicable, and any limits of which you need to be aware. Anticipating situations and developing appropriate practices will inspire a sound volunteer program.

Certain volunteer assignments may include sensitive tasks or provide access to facilities or materials that are proprietary or confidential. For example, volunteers may require access to student numbers or email addresses in order to complete their assignment. Volunteers need to know unequivocally that they are responsible for maintaining the confidentiality of all information to which they may be exposed. In addition, where volunteers are given sensitive assignments such as supervising participants under 19 years of age, it may be appropriate to obtain a Criminal Background Check. In some cases, a Criminal Background Check may be required by law (discussed further starting on page 5).

The use of volunteers must respect the boundaries of UBC's unionized environment. UBC Volunteers are not "employees" and cannot be used to supplant regular staff employees or replace the need for paid staff in your department or unit. Refer to page 6 for a discussion on Volunteer Restrictions before you establish a volunteer program to ensure that your program does not violate terms of any [collective agreements](#). If you have any questions, contact your [HR Advisor](#) before you proceed further with your volunteer program.

## **2. Recruitment, Interviewing & Screening**

This is the crucial stage where one looks to attract and properly screen volunteer candidates. As you plan your recruitment strategies, ask yourself, who would be the ideal volunteer? Why would they be interested in your volunteer opportunity? How can you reach these people? How can you create a recruitment message that encourages potential volunteers?

Depending on the number and type of volunteer positions you have, you may find it useful to utilize a variety of recruitment sources including:

- Your department's website;
- [Careers Online](#);

- Alma Mater Society ([AMS Volunteer Connect](#));
- [Alumni Affairs](#); and
- Referrals from current/previous volunteers.

Once you have selected a pool of volunteers, your next task is to carefully select those who are most suitable for the role. Volunteer screening helps create and maintain a safe environment and ensures an appropriate match between the volunteer and assignment. It is important that you plan an appropriate interview process for the volunteer position(s): the more complex the volunteer position, the more complex the screening process. For those volunteers working with minors, a higher standard of screening will be required.

Consider referencing the Confidentiality and Respectful Environment statement (contained in Appendix C).

Remember to retain all applications, screening notes, and interview notes in a separate file (paper or electronic). These should be maintained for a minimum of one year.

### **3. Orientation & Training**

Once you have adequately interviewed and screened your volunteers, you are ready for the next step: orientation and training. This stage conveys general information about UBC and specific information about the volunteer position. Orientation and training helps volunteers feel welcome, empowered and prepared. It also decreases chances of issues arising as a result of miscommunication. Volunteers will know what is expected of them and what support they can expect from the department. Included in this discussion should be a safety orientation outlining how volunteers report an accident, seek first aid, etc.

### **4. Supervision & Evaluation**

Supervision and evaluation benefit both UBC and volunteers. The volunteer supervisor needs to ensure that the volunteer is fulfilling their role effectively and provide the volunteer with critical (constructive) feedback on their performance. You may find supervision of volunteers to be more challenging than with regular staff due to irregular work schedules and restricted availability. Remember that volunteer roles can be important learning opportunities and providing the appropriate supervision will not only develop and prepare volunteers for success, but let them know that their contribution is meaningful. Please review the discussion on page 7 for some tips on providing evaluations.

### **5. Recognition**

This is the final and perhaps most important stage of the volunteer cycle. Informal recognition occurs every time a volunteer receives an appreciative and encouraging comment. As well, volunteers can be publicly recognized at the University through various celebrations and formal events. Departments regularly highlight volunteer accomplishments through contribution awards, departmental luncheons, barbecues, and other social events, and by providing reference letters.

We want our volunteers to complete their roles knowing that their efforts were meaningful, constructive, and appreciated. Note that many volunteers wish to add volunteer efforts to their resumes. Be prepared and willing to provide thoughtful and honest reference letters where required.

UBC's tradition of teaching, research, public service, and community outreach is advanced through the use of volunteer resources. The above is intended to facilitate the proper planning, structure, and implementation of successful volunteer programs. Done correctly, you will find that hosting a UBC volunteer program can be a rewarding and enriching experience.

## **B. Tools of the Successful Volunteer Program**

There are a number of tools that assist one in preparing a great volunteer program. Each of these items will be discussed in more detail below.

1. Volunteer Assignments;
2. UBC Volunteer Application Form;
3. Risk Management: Sensitive Volunteer Assignments & Criminal Background Checks;
4. Volunteer Restrictions;
5. Confidentiality & Respectful Environment Statement; and
6. Tips on Providing Evaluations for Volunteers

### **1. Volunteer Assignments**

Carefully drafted volunteer assignments will clearly convey the expectations required of both volunteers and the departments. A volunteer assignment is similar to a job description because it outlines the applicable duties, responsibilities, requisite skills, time commitments, and benefits for the position. Assignments are also similar to recruitment advertisements because they shape the overall applicant pool and outline the overall purpose of the project. Consider the following:

All volunteers appreciate knowing the purpose and goals of the organization or program. For example, "The Museum of Anthropology inspires understanding and respect for world arts and cultures" is a powerful statement that attracts those with similar interests and values. Consider including the benefits of being involved in the particular volunteer program: "Our youth volunteer program is well known for its energy and the fun our volunteers share... more importantly they learn that they make a real difference in our community."

The volunteer assignment should include language that attracts the type of applicant required for the position. For example, an assignment targeted at youth or students may differ significantly from an applicant with significant professional experience.

Describe the training that will be provided. This may draw applicants who are looking to develop or enhance certain skills. For example, "This volunteer assignment includes a one-day training and orientation for all new participants", might be particularly attractive to applicants looking to enhance their skills for resume purposes.

Be clear of what kinds of skills and experience the volunteer will acquire during their assignment. For example, “an excellent opportunity to learn teaching and coaching skills,” would be particularly attractive to a student volunteer. Stating an “opportunity to utilize the skills and training that you have in botany” may be of great interest to a retired professional or someone with an appreciation of this subject matter.

Clarify the time commitments required for the position. Specify whether the position requires minimal time commitments (i.e., minimum one shift per week) or extensive time commitments (i.e., 15 – 20 hours per week during the September/October time period). Because volunteers’ conduct and actions reflect upon UBC, make it understood that they are contributing to a reputable and safe environment.

Volunteer assignments should be reviewed periodically to ensure continuing relevance and value. Circumstances change and you want the document to properly reflect current practices.

*For further information, please see **Appendix A**.*

## **2. UBC Volunteer Application Form**

Most departments spend considerable time crafting application forms that reflect the department’s mission and volunteer assignments. Some applications may be submitted electronically which could limit the amount of information received. Endeavour to collect the following information from your applicants:

- information about the applicant;
- background, skills and abilities;
- availability;
- criminal background check (in appropriate circumstances);
- emergency contact; and
- parental consent if under 19 years of age and not registered at UBC as a student

*For further information and for an example of an application form, please see **Appendix B**.*

## **3. Risk Management: Sensitive Volunteer Assignments & Criminal Background Checks**

Certain volunteer assignments may include particularly sensitive tasks or access to confidential facilities or materials (a Sensitive Volunteer Assignment). Departments are expected to exercise judgment and due diligence when deciding if a particular task is suitable for volunteers. In some cases, a Criminal Background Check may be required by law. If unsure, [contact your HR Advisor](#).

Examples of Sensitive Volunteer Assignments include, but are not limited to, the following:

- a) working with or providing care to vulnerable individuals including patients, children, the elderly, or persons with disability;
- b) handling of animals;
- c) handling of cash;
- d) contact with hazardous substances and dangerous equipment or material;

- e) exposure to non-public, confidential or personal information whether authorized by the department or not; or
- f) access to research and development data or confidential or proprietary intellectual property whether authorized by the department or not.

UBC Volunteers performing items (e) and (f) above are required to first sign a UBC Volunteer Confidentiality Form as shown in Appendix C.

Departments must take appropriate measures to mitigate risk to all volunteers, students, faculty, staff, patients, guests or customers who may avail themselves of the services provided by volunteers. Depending on the level of risk, mitigation may entail the provision of special training or supervision, personal protective equipment, requisite certifications, immunizations, health assessments, special internal control procedures, or Criminal Background Checks. Departments must employ the same mitigation steps with UBC Volunteers as they would with employees; and furthermore, must adhere to any applicable law and University policy.

Certain tasks are not suitable for UBC Volunteers, regardless of mitigation. Such tasks should be self-evident; however, as an example, under no circumstance shall volunteers under 19 years of age be permitted access to or use of hazardous substances or dangerous material or equipment or be permitted access to or use of confidential or sensitive information as described in (e) and (f) above.

If you have questions, [contact your HR Advisor](#).

#### **4. Volunteer Restrictions**

UBC Volunteers are not employees and are therefore subject to special rules. For example, UBC Volunteers are ineligible for employee programs such as sick leave or benefits. Volunteers cannot be used to supplant or replace UBC employees. No UBC Volunteer shall perform bargaining unit work unless mutually agreed to in writing by the appropriate parties. UBC Volunteers shall not be compensated for their service. Departments may reimburse UBC Volunteers for valid out-of-pocket expenses such as transportation, meals or incidental expenses incurred during the performance of volunteer work. Such expenses require proper documentation in accordance with best practices. A volunteer program may be terminated without prior notice any time the department determines that (a) volunteer services are no longer required; or (b) that the volunteer(s) may no longer be capable of performing the service. No volunteer service performed on UBC's behalf shall create any entitlement, right or privilege on the part of any individual to continue providing volunteer services for UBC in the future or otherwise. The minimum age for UBC volunteers is 13 years. Volunteers under the age of 19 and who are not UBC students require parental authorization to qualify. (See the UBC Volunteer Application Form)

#### **5. Confidentiality and Respectful Environment Statement**

*Please see **Appendix C**.*

#### **6. Tips on Providing Evaluations for Volunteers**

When preparing a volunteer's evaluation, consider the overall volunteer assignment as well as the needs of the particular volunteer. For example, it is likely less important to provide feedback to a well-established worker or a retiree about their work style, attitude and abilities. However, such information would usually be extremely important to a young volunteer beginning their career. It may be helpful to ask the volunteer how they might evaluate themselves. Create a self-assessment tool for your volunteers and let them set the tone and goals for their volunteer work and evaluation. In doing so, consider the following:

- Ask the volunteer what he or she is proud of in their volunteer work, what skills they have learned, and where they see possibilities for self-improvement. Then provide your impressions of these same issues.
- Focus on more than work skills. Connect the volunteer's efforts to the goals of the program or organization.
- Cite positive feedback whenever you can; tell them what clients or other volunteers or staff has noted about their style, their work habits or others aspects of their involvement.
- Use the "sandwich" approach. If you have a suggestion for change to make or a critique to offer, position the statement between two positive comments.
- Do not generalize. Be specific and use examples wherever possible. Avoid awkward questions such as "I think you're doing great, don't you?"
- Ask questions that allow volunteers to critique or identify challenges, "If you could change one thing about your volunteer position (the program, the training we did, etc.), what would it be?" Use this opportunity to reflect on their feedback as it relates to your program.
- Before introducing any potentially negative comments make sure the volunteer has had a chance to identify things he or she would like to change about their performance. You'll be surprised how often they put the finger on the very challenge you were about to raise.
- Be accepting of mistakes. Don't make a big deal about things done wrong. Make it clear that errors are a learning tool; as confidence grows, their mistakes will decrease.

The above is not intended to be an exhaustive list of such considerations. Common sense will often guide you appropriately through this process.

By employing the above practices, you will find volunteerism to be an extremely helpful and rewarding enterprise, on many different levels. As with all activities, practice makes perfect and committing to a formalized process will undoubtedly lead to acquiring a 'perfection' that much earlier.

Good luck!

### **Resources**

Volunteer Canada: <http://volunteer.ca/>

The Canadian Code for Volunteer Involvement: <http://volunteer.ca/files/CodeEngJune2006.pdf>

AMS Volunteer Connect: <http://www.ams.ubc.ca/services/ams-volunteer-connect/>

Alumni Volunteers: <http://www.alumni.ubc.ca/get-involved/volunteer/about-the-volunteer-program/>

## Appendix A

### ASSIGNMENT PLAN

#### I. Description of Volunteer Services

Department:

Unit (if applicable):

Duration of Assignment: (Begin)

(End)

Anticipated Number of Hours:

per [ ] Week or [ ] Month

|   |
|---|
| Description of Services to be Provided: |
|---|

Supervisor's Name and Title:

|   | List Requirements for the Assignment |
|---|--------------------------------------|
| Training:                                   |                                      |
| Equipment:<br>(including protective)        |                                      |
| Physical Requirements:                      |                                      |
| Certifications:                             |                                      |
| Criminal Background<br>Check (if required): |                                      |
| Other (Specify):                            |                                      |

#### II. Agreement and Acknowledgement of Services (to be completed by Volunteer)

I \_\_\_\_\_, agree to abide by the policies, standards, and procedures of the University of British Columbia and the respective Department(s).

I acknowledge that I am voluntarily donating my services to the University of British Columbia. I understand and agree that I am a volunteer and am not an employee of the University of British Columbia in respect of all volunteer assignments. I further understand and agree that I am not entitled to, and have no expectation of, any compensation, pay, fee, or benefits for my services. I acknowledge and agree that my volunteer services do not constitute a guarantee or promise of future employment, nor do they entitle me to greater consideration for any future employment or volunteer opportunities. I further acknowledge and agree that my volunteer service and any rights or privileges associated therewith may be terminated at any time by the University without cause or notice.

Applicant Name (Print): \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parental Consent: Required for Applicants under the age of 19 years

Parent/Guardian Name (Print): \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Appendix B

### VOLUNTEER APPLICATION FORM

#### **I. Applicant Information**

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Address: (Street) \_\_\_\_\_ (Apt#) \_\_\_\_\_

(City) \_\_\_\_\_ (Province/State) \_\_\_\_\_ (Postal Code) \_\_\_\_\_

Telephone: (Home) ( ) \_\_\_\_\_ (Business) ( ) \_\_\_\_\_ (Cell) ( ) \_\_\_\_\_

#### **II. General**

How did you hear about this volunteer opportunity at UBC? \_\_\_\_\_

Are you currently employed by UBC? YES  NO  If YES please indicate when you started with UBC and the role in which you are employed \_\_\_\_\_

Are you currently a student at UBC? YES  NO  If YES please indicate your program and year of study \_\_\_\_\_

Are you a UBC Alumnus? YES  NO  If YES please indicate program and year of graduation \_\_\_\_\_

Are you currently volunteering with UBC or have you volunteered with UBC in the past?

YES  NO  IF YES, please indicate the volunteer assignment(s) \_\_\_\_\_

Are you 19 or older? YES  NO  IF NO, please indicate date of birth \_\_\_\_\_

#### **III. Availability**

Which hours are you available for volunteer assignments? Check the appropriate boxes.

|           | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
|-----------|--------|---------|-----------|----------|--------|----------|--------|
| Morning   |        |         |           |          |        |          |        |
| Afternoon |        |         |           |          |        |          |        |
| Evening   |        |         |           |          |        |          |        |

#### **IV. Interests and Skills**

Briefly describe the areas in which you are interested in volunteering, and your relevant skills and qualifications.

**V. Emergency Contact**

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_  
Address: (Street) \_\_\_\_\_ (Apt#) \_\_\_\_\_  
(City) \_\_\_\_\_ (Province/State) \_\_\_\_\_ (Postal Code) \_\_\_\_\_  
Telephone: (Home) ( ) \_\_\_\_\_ (Business) ( ) \_\_\_\_\_ (Cell) ( ) \_\_\_\_\_

**VI. Respectful Environment Declaration (<http://www.hr.ubc.ca/respectful-environment/>)**

I understand that the University of British Columbia endeavours to foster a harmonious climate in which volunteers, students, faculty and staff are provided with the best possible conditions for learning, researching, and working, including an environment that is dedicated to excellence, equity and mutual respect. The University of British Columbia strives to realize this vision by establishing opportunities and practices that respect the dignity of individuals and make it possible for everyone to live, work and study in a positive and supportive environment as possible.

As a Volunteer it is expected that I will abide by the above and show respect for all people and their differences, demonstrate fairness and equity, try to understand the perspectives of others, promote cooperation and collaboration, endeavour to bring out the best in others, demonstrate empathy; and use respectful language at all times.

**Declaration**

By submitting this application, I declare and affirm that the facts set forth in it are true and complete. I authorize UBC to verify any information that may be relevant to both my service and suitability as a UBC Volunteer. I understand that if I am accepted as a UBC Volunteer, any false statements, omissions, or other misrepresentations made by me on this application may result in my immediate dismissal from any volunteer assignment.

Applicant Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parental Consent: Required for Applicants under the age of 19 years and those who are not UBC students

Parent/Guardian: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Appendix C

### UBC VOLUNTEER CONFIDENTIALITY AGREEMENT

I, \_\_\_\_\_, acknowledge and understand that, during the course of my work as a UBC Volunteer, I may acquire access or use of certain sensitive or confidential information (“Confidential Information”). I acknowledge and agree that any such confidential or proprietary information, including, but not limited to, medical or personal information, trade secrets, patents, confidential research and development data, or any other sensitive information, shall be kept confidential. In consideration for this volunteer opportunity, the receipt and sufficiency of which is hereby acknowledged, I further agree to the following:

- I. The term Confidential Information includes information not generally known to third parties and which is proprietary to the University of British Columbia (“UBC”) or its affiliates, including information about UBC’s various projects and departments. All information that becomes accessible or disclosed to me during the course of this volunteer appointment shall be deemed Confidential Information.
- II. I understand that unauthorized disclosure or use, whether intentional or unintentional, of any Confidential Information would be detrimental to UBC. I acknowledge and agree:
  1. not to disclose to any third party the object and scope of any sensitive discussions that I may be privy to, except as required by law or as may be necessary to enforce the terms hereof;
  2. not to use any of the confidential information for any purpose other than for or in connection with the authorized purpose;
  3. to maintain all of the confidential information in confidence and not to disclose any portion of the confidential information to any person or entity not authorized hereunder without the prior written consent of UBC;
  4. that any dissemination of confidential information shall be only in connection with the authorized purpose, and shall be only to UBC employees, agents or affiliates who have a need to know such confidential information as it relates to the authorized purpose; and
  5. that upon termination of the volunteer relationship, all records, compositions, articles, documents and other items which contain, disclose and/or embody any Confidential Information shall be returned to UBC or destroyed by myself, and I will certify to UBC that I am in full compliance with these provisions.
- III. The obligations pursuant to Section B above shall not apply to information which:
  1. is or becomes a part of the public domain through no act or omission of my own;
  2. can be shown to be already possessed by myself as of the date of disclosure;
  3. shall be made available to myself on a non-confidential basis by a third party having a right to do so;
  4. is disclosed by order of a court of competent jurisdiction; or
  5. UBC authorizes the release of such information in writing.
- IV. The termination of the relationship between myself and UBC shall not relieve me of my obligations of confidentiality and non-disclosure herein or the obligation to return or destroy certain materials.

**Declaration**

I have carefully read the foregoing UBC Volunteer Confidentiality Form and declare I fully understand its contents and my obligations. If the Applicant is not of age of majority, I, as a parent or legal guardian of the Applicant have fully read the foregoing UBC Volunteer Confidentiality Form and fully understand my obligations assumed on behalf of the Applicant.

Applicant Name (Print): \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parental Consent: Required for Applicants under the age of 19 years

Parent/Guardian Name (Print): \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_