

# Volunteer Program Policies & Procedures

---

## Table of Contents

Volunteer Policy .....	2
Volunteer Screening Policy .....	6
Volunteer Expense Reimbursement Policy.....	10
Volunteer Discipline Policy .....	11

---

### *Procedures and Forms referenced in this document:*

- Human Resources Policies
- Safety Manual and Safety Program Policies

<b>Title: Volunteer Policy</b>	<b>Category: V1</b>
<b>Applies to: Volunteers</b>	<b>Approved: July 26, 2021</b> <b>Revised: December 2, 2024</b>
<b>Review Frequency: Every three years</b>	<b>When: July 2027</b>

## Purpose

Volunteers play a vital role in assisting the Western Development Museum (WDM) to fulfill its mandate. The WDM is committed to accepting, encouraging, and supporting volunteers within our organization and working to ensure that volunteering experiences are meaningful, enjoyable, rewarding and safe.

## Requirements

### 1. Definitions

- a. Volunteer: anyone who performs tasks for and under the direction of the WDM without compensation or expectation of compensation. A volunteer is expected to adhere to the same standards of professionalism and conduct as paid staff.
- b. Volunteer Assignment: a task or series of tasks that enhance and complement the programs or services of the WDM and are developed in fulfillment of its mandate.
- c. Partner/Rental Client Volunteer: individuals volunteering as part of a partnership agreement or rental client event or activity not under the direction or control of the WDM. The WDM is not responsible for these individuals but reserves the right to ask for their removal from our property if necessary.

### 2. Guiding Principles

- a. The WDM engages volunteers to enrich, complement and support all areas of the Museum's work.
- b. Volunteers are not a substitute for employees and the WDM does not recruit volunteers to displace paid staff.
- c. The WDM is committed to developing a diverse volunteer body and to making volunteering opportunities as accessible and responsive as possible to the different needs of our volunteers.
- d. The WDM is committed to providing all prospective and current volunteers with equal opportunities to volunteer, regardless of religion, creed, marital status, family status, gender, sexual orientation, age, colour, ancestry, nationality, place of origin, race or perceived race, or ability.
- e. The selection and engagement of volunteers will be conducted in keeping with specific operational procedures, as revised from time to time.
- f. The relationship between volunteers and the WDM does not create a legally binding contract. The WDM embraces volunteerism on the understanding that volunteer services are received at its sole discretion and that any volunteer's relationship with the Museum may be terminated by either side at any time for whatever reason.

- g. Volunteers are supervised by WDM staff, and do not have the authority to represent the WDM (including speaking to media or using the WDM logo), make contracts for the WDM, or make any other commitment on its behalf.
  - h. The WDM accepts volunteer services of its own employees only in compliance with the *Employment or Volunteer Assignments External to the WDM Policy*.
3. Museum Volunteer Management
- a. There will be a minimum of one designated volunteer coordinator/engagement assistant at each WDM location responsible for screening, supporting, orientating and managing volunteers.
  - b. Volunteers under the age of 18 need a signature of a parent/guardian in order to be approved as a volunteer. School sanctioned work placements are exempt from this requirement.
  - c. Volunteer Roles – Volunteer roles and projects are established and approved by the volunteer coordinator/engagement assistant, in consultation with the relevant Museum Operations Manager and the Volunteer Engagement Manager.
  - d. Personnel Files – The WDM will maintain personnel files for all volunteers. Personnel files will include contact information, emergency contact information, Criminal Record Check documents if required, and hours worked. All files and personal information will be kept and maintained by the WDM in accordance with the Saskatchewan Privacy Act and provincial records retention requirements.
  - e. Screening – The WDM will screen all volunteers. The level of screening required will depend on the volunteer assignment and will follow the WDM *Volunteer Screening* policy.
  - f. Orientation and Training – Volunteers will be provided with orientation and training appropriate to their volunteer assignment. This will include information about the Museum and its goals, relevant policies and guidelines, volunteer assignments and expectations, task specific training, safety and emergency procedures, and overall Museum rules.
  - g. Supervision and Support – Volunteers will be made aware of the Museum staff point person for each role they are performing or program/event they are assisting with. Volunteers may also contact the designated volunteer coordinator/engagement assistant with any questions or concerns.
  - h. Addressing Volunteer Concerns – Volunteers’ concerns and issues will be treated in an appropriate and confidential manner as per the WDM *Harassment and Conflict and Complaint Resolution* policies.
  - i. Discipline and Dismissal – Volunteers who do not adhere to the policies, rules and procedures of the WDM or who fail to satisfactorily perform their volunteer assignment are subject to the WDM *Volunteer Discipline Policy*.
4. Volunteer Responsibilities
- a. All volunteers are expected to promote the aims, values and reputation of the Museum, adhere to all policies and procedures, and to carry out tasks

responsibly. This includes acting within the set boundaries and authority of their role.

- b. Confidentiality – The WDM expects the highest standards of confidentiality to be maintained by volunteers in regard to matters relating to the WDM Board and staff business, as well as to matters relating to member/consumer business, as outlined in the *WDM Confidentiality* policy. Volunteers may be asked to sign a confidentiality agreement if their assignment requires it.
- c. Dress Code - Volunteers shall dress appropriately for their volunteer assignment. This includes adhering to the *Representing the WDM / Dress Code* policy and wearing all required Personal Protective Equipment.
- d. Absenteeism - Volunteers are expected to perform their duties as scheduled.
- e. Copyright - Unless otherwise agreed, it is assumed that copyright on creative work undertaken by volunteers as part of their WDM assignment belongs to the WDM.
- f. Museum volunteers may not communicate on behalf of the WDM (i.e. with the media) unless authorized to do so by WDM staff.
- g. The use of alcohol, cannabis or illegal drugs while volunteering for the WDM is not permitted under the *Staff and Volunteer Conduct, Drug and Alcohol, and Impairment* policies.

## 5. Safety

- a. All volunteers must adhere to WDM safety procedures and regulations.
- b. Volunteers may only access or use, or allow others to access or use, WDM property, space, and equipment for which they have explicit authority. Training and/or proof of competency may be required for approval to operate tools and equipment.
- c. The WDM will provide training, tools, equipment, and facilities necessary for the safe accomplishment of Museum tasks.
- d. When acting as WDM volunteers in approved volunteer assignments, volunteers are covered by the WDM's liability insurance and those under the age of 70 are covered by the WDM's accident insurance policy. The WDM assumes no responsibility for any loss or injury incurred by a volunteer where said loss or injury is incurred through their own negligence or through disregard of the WDM's stated safety and security requirements.
- e. The WDM will indemnify volunteers and hold them free from liability for civil liability to any person as the result of personal injury loss or damage arising from the execution or purported execution of tasks assigned to them on WDM premises. This indemnity will not apply where a volunteer acts negligently, recklessly or in bad faith.

## 6. Financial Arrangements

- a. All moneys raised by Museum volunteers as part of Museum directed activities belongs to the Museum.
- b. WDM volunteers will not normally be reimbursed for expenses incurred relating to volunteering, except as per the *WDM Volunteer Expense Reimbursement* policy.

- c. Private business may not be undertaken by volunteers during Museum events or programming activities, unless prior, written permission has been obtained from the Museum.
  - d. While acting as a WDM volunteer, personal tips or gifts must be handled in accordance with the WDM *Gifts and Tips* policy.
- 7. Volunteer Recognition and Benefits
  - a. The WDM appreciates and will publicly acknowledge the valuable services provided by volunteers.
  - b. Volunteer benefits and requirements will be provided in keeping with specific operational procedures, as revised from time to time.
- 8. Policies Applying to Volunteers
  - a. WDM volunteer program policies, including Volunteer Screening Policy, Volunteer Reimbursement Policy, and Volunteer Discipline Policy.
  - b. WDM policies, including Confidentiality, Representing the WDM / Dress Code, Conflict of Interest, Criminal Record Check, Employee and Volunteer Conduct, Impairment, Conflict and Complaint Resolution, Harassment, Use of WDM Resources / Assets, Gifts and Tips, and the policies and rules contained in the WDM Safety Manual.
- 9. Policy review
  - a. This policy will be reviewed every three years by WDM staff.

<b>Title:</b> Volunteer Screening Policy	<b>Category:</b> V2
<b>Applies to:</b> Volunteers	<b>Approved:</b> July 26, 2021 <b>Revised:</b>
<b>Review Frequency:</b> Every three years	<b>When:</b> July 2024

## Purpose

The WDM is committed to ensuring a safe environment for all staff, volunteers, and visitors. As part of this commitment, and per the WDM Volunteer Policy, all volunteers will be subject to screening at the level appropriate to their assigned role.

1. This Volunteer Screening Policy ensures that the WDM has taken due diligence to protect:
  - a. Volunteers, Museum Volunteer Groups, and Affiliated Volunteer Groups while volunteering for or on behalf of the WDM.
  - b. The integrity of cash management, financial transactions and WDM resources.
  - c. Volunteers and visitors, particularly those belonging to a vulnerable sector, as defined by the Canadian Criminal Records Act.

## Requirements

1. All volunteer roles and positions will be assessed and assigned a screening level according to the WDM Screening Levels Chart (Appendix 1) and Screening Levels Guidelines (Appendix 2).
2. All individuals will be screened before assuming a volunteer role. If individuals change or add volunteer roles, they may be rescreened.
3. Staff designated as volunteer coordinators/engagement assistants at each WDM location will keep a record of which roles require screening, conduct or direct this screening, and collect and store any documentation that is collected as part of this process. These documents will be kept with volunteer personnel files and maintained by the WDM in accordance with the Saskatchewan Privacy Act and provincial records retention requirements.
4. The WDM reserves the right to refuse or reject an applicant based on the results of this screening.

**Appendix 1**  
**Volunteer Screening Policy - Screening Levels Summary Chart**

Screening Level	Assignment Functions/ Risk Levels	Screening Required
L1	Low risk assignments where individuals are not in a supervisory role or alone with members of a vulnerable sector.	Basic screening consisting of: <ul style="list-style-type: none"> <li>• Volunteer Information Form</li> <li>• Signed volunteer agreement</li> </ul> Optional: <ul style="list-style-type: none"> <li>• In-person interview</li> </ul>
L2	Assignments where individuals require specific qualification(s) / certification(s) / agreements.	L1 + Proof of specific qualification(s)/certification(s) and / or agreements.
L3	High risk assignments that meet the criteria listed under the WDM Criminal Records Check policy, as well as any volunteers for are keyholders for or have access to a key to WDM properties.	L1 + L2 (if applicable) + Criminal Record Check

**Appendix 2**  
**Volunteer Screening Policy - Screening Levels Guidelines**

**Level 1 (L1): Low Risk Assignments**

Includes:

- All WDM Volunteers
- All Museum Volunteer Group members
- All Affiliated Volunteer Group members who wish to volunteer at or on behalf of the WDM

The screening of individuals at this risk level will consist of:

1. Volunteer Information Form – Mandatory minimum standard for all WDM volunteers.
2. Signed Volunteer Agreement.
3. OPTIONAL: In-Person Interview – This is strongly recommended for all volunteers, but may not be practical in all cases. In-person interviews will be conducted by staff designated as volunteer coordinators/engagement assistants.

## Level 2 (L2): Positions Requiring Specific Qualifications or Agreements

The screening of individuals at this risk level will include Level (L1), plus either or both of the following:

### 1. Qualifications Check

Includes, but is not limited to:

- Any volunteer role which includes operating a vehicle (this includes gas powered equipment) owned by the WDM or provided to the WDM under an agreement with a lender/donor. These roles will require a valid Driver's Licence.
- Individuals bringing personal vehicles or equipment for display or operation are not considered volunteers and are covered by the WDM Visiting Vehicle / Equipment Guidelines & Rules.
- Any volunteers operating steam powered equipment. Requirements for these volunteers are outlined in the WDM Steam Policy.
- Any volunteer roles that include working with materials covered under the *Hazardous Products Act*. These roles require familiarization with Workplace Hazardous Materials Information System (WHMIS) regulations.

Requirements:

- a. Individuals must provide copies of documents proving qualifications/certifications as required for the specific role. Requirements will vary depending on qualification needed. Copies of these documents will be kept in the Volunteer's personnel file.
- b. These documents must be provided before an individual assumes the volunteer role.

### 2. Signed Confidentiality Agreement

Includes, but is not limited to:

- Any volunteer role which involves data entry.
- Any volunteer role which involves access to matters relating to the WDM Board and staff business or matters relating to member/consumer business.

Requirements:

- a. Individuals must sign the WDM Confidentiality Agreement.

### **Level 3 (L3): High Risk Assignments**

Includes all roles that meet the criteria listed under the WDM *Criminal Record Check* policy.

The screening of individuals at this risk level will consist of Level 1 and L2 (if applicable), plus the following:

1. Criminal Record Check (including Vulnerable Sector Search if appropriate)
  - a. The need for a criminal record check will be made clear to the individual early in the application process.
  - b. The WDM will provide individuals with information outlining how to apply for a criminal record check including a standard letter to the screening body explaining the reason for screening and a statement that the role is voluntary without expectation of compensation.
  - c. The WDM will incur the cost of a criminal records check required under this policy.
  - d. The results of a criminal record check will be submitted in confidence to the staff person designated as volunteer coordinator/engagement assistant at the WDM location they wish to volunteer for. They will be evaluated based on the WDM Volunteer Criminal Record Check Evaluation Guidelines.
  - e. If the WDM decides to reject an individual based on the result of a criminal record check, the WDM will let the individual know as soon as possible.
  - f. A criminal record check submitted by a WDM volunteer shall be valid for the duration of their time with the WDM or at the discretion of the WDM.
  
2. For keyholders or those with access to keys to WDM grounds or facilities, a signed Facility Access Agreement and Waiver will also be required.

<b>Title: Volunteer Expense Reimbursement Policy</b>	<b>Category:</b>
<b>Type:</b> Volunteer Program	<b>Approved:</b> October 7, 2024 <b>Revised:</b>
<b>Review Frequency:</b> Every three years	<b>When:</b> Q3 2027

WDM Volunteers will not normally be reimbursed for expenses incurred related to preparing or training for or travelling to a WDM or off-site location to complete their volunteer roles.

Exceptions:

- When a criminal record check is required, a letter from the WDM stating this will be provided. Volunteers will be reimbursed for costs associated with approved checks. (See HR 6 Criminal Record Checks.)
- When volunteer animal owners are approved by the WDM to bring live horses to a WDM for an event or program using personal vehicles and trailers, mileage costs will be reimbursed for approved travel at the same Travel Rate as for employees using private vehicles.  
NOTE: Bringing animals to the WDM requires a signed WDM Animal Owner Agreement which should include provision for travel reimbursement.
- Any other exception must be approved in writing by a volunteer coordinator/engagement assistant, Manager, or Director before the expense is incurred.

All receipts from approved expenses must be submitted within two weeks of the purchase.

The staff person approving the reimbursement will provide the WDM Expense Form for the volunteer, ensure it is filled out accurately, and submit it for processing.

<b>Title: Volunteer Discipline Policy</b>	<b>Category: V3</b>
<b>Applies to:</b> Volunteers	<b>Approved:</b> July 26, 2021 <b>Revised:</b> April 17, 2024
<b>Review Frequency:</b> Every three years	<b>When:</b> July 2024

**Purpose**

The WDM will be decisive in addressing volunteer performance deemed to be deserving of disciplinary measures and / or flagrantly inappropriate. This approach will ensure that volunteers demonstrating unacceptable behaviors or performance understand the potential finality of their volunteer status and are given the opportunity to undertake the fundamentally improved performance or behavioral change required to avoid dismissal.

The steps in this policy are closely related to the *Egregious or Disciplinary Performance Measures Policy* (HP20) for WDM Staff.

**Requirements**

Disciplinary measures will apply when performance or actions are deemed to be any of the following:

- in contravention of instructions from a WDM staff person,
- in contravention of any WDM policy, including the Volunteer policy and the Staff and Volunteer Conduct policy,
- in contravention of any of the statements on the volunteer’s signed Volunteer Agreement,
- chronically poor i.e. below expectations and resistant to all attempts at improvement.

Discipline will usually be progressive. Instances of egregious behaviors or misconduct may warrant a response that includes immediate suspension or dismissal without verbal or written reprimands.

The progressive discipline steps that usually apply are:

**Verbal Reprimand**

Staff members supervising or observing a volunteer must take concerns to the relevant volunteer coordinator/engagement assistant. Volunteer coordinators/engagement assistants will normally give verbal guidance or correction if required.

Any staff member supervising or observing a volunteer doing something unsafe or against a WDM safety rule or guideline may immediately give a verbal reprimand. Staff doing so must report this reprimand in writing to the relevant volunteer coordinator/engagement assistant as soon as possible.

All verbal reprimands must include a statement of the performance and / or behavioral concerns, the corrections required and the consequences of continued misconduct or under-performance.

The verbal reprimand is not recorded in the volunteer's personnel file. The volunteer coordinator/engagement assistant is required to keep in writing a documented, confidential record of the reprimand.

When volunteers give time at multiple locations, the Volunteer Engagement Manager will also be informed.

### **Written Reprimand**

Written reprimands must be issued by a Museum Operations Manager or Volunteer Engagement Manager, in conjunction with a volunteer coordinator or volunteer engagement assistant. All written reprimands must include a statement of the performance and/or behavioral concerns, the corrections required, the consequences of continued misconduct or under-performance, and a summary of performance improvement interventions (including verbal reprimands) to date as a reminder of the WDM's efforts to address the situation.

A written reprimand is placed in the volunteer's personnel file and a copy is forwarded to the Volunteer Engagement Manager. If the volunteer is registered at multiple WDM locations, the Museum Operations Manager and volunteer coordinators/engagement assistants at those locations will also be informed.

### **Suspension**

Suspension is an enforced temporary absence from duty. Suspension is an option that can be used as a step in the rehabilitation of a volunteer and is usually for a limited time, depending on the nature of the misconduct. Suspension may also be used for an indefinite period of time if the misconduct is serious and an investigation is required and pending. Upon return, volunteers will be required to re-do all relevant orientations.

A suspension cannot be implemented without consultation with the Volunteer Engagement Manager and relevant Museum Operations Manager. If the volunteer is registered at multiple WDM locations, the volunteer coordinators/engagement assistants at those locations will also be informed. The CEO will be informed of all suspensions.

### **Dismissal**

Dismissal under this policy reflects the WDM's decision to terminate our relationship with a volunteer.

A dismissal cannot be implemented without consultation with the Volunteer Engagement Manager and relevant Museum Operations Manager. If the volunteer is registered at multiple WDM locations, the volunteer coordinators/engagement assistants at those locations will also be informed. The CEO will be informed of all dismissals.