

Volunteers – the Right Fit

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Library Volunteers

- These same principles apply to general library volunteers and Friends volunteers.
- In some libraries, all volunteers, including Friends are managed by library staff.
- In many libraries, the library's volunteer application form has a section outlining specific tasks they can assist with for the library and for the Friends
- Some Friends groups have their own application form.

Library Volunteers

- In some libraries, a library staff person responsible for volunteers will provide the Friends with the applications of those who wish to assist with their events or activities.
- In other libraries, the Friends are responsible for all of some of the following:
 - Recruitment
 - Job or Position Descriptions
 - Screening and/or Interviewing
 - Orientation and Training (including health and safety and other legislated training)
 - Supervision and Evaluation
 - Record Keeping and Documentation

Risk Management - Training

Library Orientation/Training/Supervision

- Volunteers screened and trained by Library staff are generally trained and supervised by designated Library staff.
- It is critical to have written policies and procedures in place to mitigate risk from a legal and health and safety perspective.
- General orientation for volunteers should include the same type of occupational health and safety training required for library workers

Risk Management - Training

Friends Orientation/Training/Supervision

- Volunteers screened and trained by Friends volunteers often have less supervision by staff or by a Friend, depending on the task they have taken on.
- It is important to have written Friends' policies and procedures

Risk Management – Due Diligence

A combination of both Library and Friends' orientation and training will ensure due diligence has been followed.

Due Diligence requires you to:

- Develop specific procedures & practices
- Train volunteers in the procedures/practices
- Monitor adherence
- Enforce compliance
- Communicate the procedures/practices

Risk Management – Due Diligence

Duty of care

- This is the obligation, created by law, to take care not to harm others by act or omission

Standard of care

- The degree of care which a reasonable person would exercise in similar circumstances so as to avoid exposing others to an unreasonable risk or harm

Zulensky, D. (2005) Health & Safety orientation for part-time / volunteer staff for libraries and other associations.

Risk Management - Documentation

- Library and/or Friends application forms need to protect the person's privacy and ensure their information will be used only for purposes specified on that form.
- Applications and all records need to be kept in a secure location, where only specific individuals are able to access them. The volunteer should be informed that this is the case.
- For both library and Friends volunteers, job descriptions for key positions are important, including supervision or reporting (even if it is informal).

Risk Management and Liability

- Library volunteers should know if they are covered by liability insurance for events inside or outside the library and whether the Board (Friends of Library Board) has Directors' liability insurance.
- Some library volunteers and Friends volunteers are covered by the library's insurance policy for events inside or outside the library and some are covered by municipal or county liability insurance policies.
- Some people interested in serving on a Board will not join unless the organization has Directors' liability insurance.

Risk Management and Liability

- Some Boards use the insurance offered by a company associated with Volunteer Canada and this involves a membership to Volunteer Canada (\$100 a year), as well as the insurance premium with the Insurance Company.

Under our Wing Insurance

<http://volunteer.ca/membership/under-our-wing-insurance>

Risk Management - Job Descriptions

- Title
- Volunteer Skills and Qualifications
- Time Commitment, including length of commitment
- Responsibilities
- Supervision
- Evaluation
- Date, Signature

Risk Management - Job Descriptions

- Once you have position descriptions, you can evaluate each position relative to the level of risk:
 - Participant
 - Setting
 - Supervision
 - Nature of Relationship with participant
 - Degree of physical contact
 - Access to information

See Volunteer Centre of Guelph, Policy Screening, Policy Development Tool

Risk Management - Job Descriptions

- Additional job hazard analysis will identify
 - Job steps
 - Tools needed
 - Level of physical exertion required
 - Health and Safety hazards
 - Control measures

Risk Management - Job Descriptions



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Job Hazard Analysis

Snack Bar Clerk

Job Steps	Tools/Mat'ls needed	H&S Hazards	Control measures
Serve customers	Apron, phone Non- slip shoes	Hot Coffee, ST&F, Violence	Training, PPE Emergency contacts
Open & Close	Keys, escort wireless phone	Personal security	Security procedure & training
Handling cash	Locked cash bag wireless phone, safe	Robbery	Limit cash float, vault, training (see above)
Refills condiments	Condiments	Slips, Trips & Falls	Clean dry floors
Clean café area & equipment	Cleaning supplies Non- slip shoes	Cleaning chemicals	Training, PPE, ST&F awareness

Zulensky, D. (2005) Health & Safety orientation for part-time / volunteer staff for libraries and other associations.

Recruitment

- Determine which tasks need to be done by your volunteers and the kinds of skills required by applicants. Using a skills-based approach leads to a better quality of volunteer.
- Develop position descriptions for key positions.
- Library volunteers:
 - Assisting with a homework club
(retired teachers, older students)
Driver for Homebound Service
(must have a valid driver's license, retired person)

Recruitment

- Friends volunteers
 - Friends Board member
(retired person with some Board or Committee experience, young professional)
 - Book Sale volunteer (selling books)
(retiree who can stand for periods of time, students who enjoy interacting with people)
 - Book Sale volunteer (moving boxes)
(high school, college or university students are ideal – in Ontario, must have 40 hours of volunteer service to graduate from high school)

Recruitment

- Friends volunteers
 - Treasurer
(accountant, a retired business person – some businesses require their staff to take on volunteer work)
- Library Board Trustee
(retired teacher, retired librarian, young professional)

Screening/Interviewing

- Many libraries use Volunteer Canada's 10 Steps of Screening

<http://volunteer.ca/content/screening-10-steps>

Whether or not a volunteer will need to have a Police Check usually depends on whether they will be handling money or whether they may be directly interacting with a young or a vulnerable person.

Some libraries or municipalities require Police Checks of all volunteers.

Screening/Interviewing

- Application form received
- Interview for most positions (even informal)
 - Allows for elaboration on position descriptions where applicant shows interest
 - Likely not necessary for a student helping out with a book sale
- Reference checks
 - More than one reference is a good idea
- Police records check, if required

Screening/Interviewing

- This is the time when individuals who do not fit with the position descriptions or philosophy of your organization can be told there is no position for them. “Weeding out” people who are not the right fit at this point will most likely prevent problems that might arise if you don’t have this step in place. You often can sense if the person may make someone else uncomfortable.
- Interviewing in person will provide an opportunity to get a feel for how best to utilize the person’s skills and interests.

Reference Checks

- Find out the relationship of the person to the applicant.
- Learn more about the applicant.
 - Skills
 - Background,
 - Personality, Strengths
- You can get an opinion on whether the person is suitable for the position
 - Describe tasks, people the applicant will be working with

Orientation

Benefits of Orientation

- Shows concern for volunteers
- Introduces safety “culture”
- Immediate volunteer awareness
- Provides consistent information in the form of policies and procedures
- Enhances quality, productivity and profitability
- Makes the volunteer part of the team

Orientation

- The volunteer should become familiar with the library, the staff and/or the Friends organization.
- Basic information should include mission and/or vision statements of the library and/or the Friends, the library's website and any specific information relevant to the position.
- Familiarize the new volunteer with the physical layout of the library, where the supervisor's office is located, safety information, and what to do in an emergency.
- Go over volunteer opportunities, the chosen position description, responsibilities and expectations, have the person sign the position description and provide them with a copy.

Training

- Training
 - Library Policies and/or Friends Policies (e.g. Code of Conduct)
 - Health and Safety Training
 - Legislated Accessible Customer Service Training (ON)
 - Human Rights Code – in all provinces and territories
 - Signed Documentation of Orientation and Training Completion with Date

Orientation and Training

- Record of Orientation, Training and Agreement with Policies, Expectations and Position Responsibilities
 - Signing the position description
 - Interview, with opportunity to ask questions
 - Orientation and Training record

Supervision

- The volunteer's supervisor (if there is one) should be listed on the job or position description.
- Contact information should be provided, as well as who to contact if that person is unavailable.
- If there is a requirement for reporting on the progress of the volunteer task, there should be a specific date and process for reporting.
- Some supervision is fairly informal, but the volunteer should at least know who to speak to if they have questions or concerns.

Evaluation/Performance Appraisal

- If there is a performance appraisal of the volunteer by a supervisor, it should be fair, subjective and constructive.
- The evaluation should take place within 2 to 3 months of the start of volunteering so that if there are any concerns they can be dealt with early in the process.
- There should be an established complaints process to either rectify problems or to enable the organization to let the person go.

Complaints Process

- Even if there is no formal complaints process for situations involving volunteers, it should be clear who the volunteer should speak to if there is a complaint and how the complaint will be handled.
- Ideally, an informal process to resolve the problem can be worked out with the supervisor.
- Some libraries may wish to use the same complaints process with their volunteers as they use with their employees.

Complaints Process

- Friends groups tend to be more informal and there can be challenges involving differing points of view. Usually differences can be worked out and the parties can agree on a solution. Sometimes, a person resigns if they are unhappy with the solution.
- In the case of the Friends, if there is a complicated situation where support from the library is required, a discussion between the President of the Friends and the Library CEO can lead to a solution.

Records - Documentation

- A file should be kept for each volunteer, beginning with the application form, a signed position description, and a dated record of orientation and training.
- Records of direct supervision and/or performance appraisals should also be kept in the file.
- If there are performance appraisals or an exit evaluation when the volunteer leaves, these should also be kept in the file.

Board Volunteers

- Friends Boards can be quite informal, without Bylaws, policies, formal volunteer screening or job descriptions. In many instances, this works well and there are no problems.
- With other Friends Boards, Board members have considered potential risks and have developed a Constitution and/or Bylaws, or policies, a volunteer screening and training process and/or job descriptions.

Board Volunteers

- Library Boards have a more formal process for recruitment, training, guidelines and policies, as set out by provincial legislation.
- Many Boards have developed their own Conflict of Interest guidelines, Code of Conduct, Privacy Policy and other policies to ensure there are written documents to refer to when problems arise and to protect themselves as much as possible.

Financial Responsibilities

- Boards dealing with large amounts of money are often concerned with legal liability. Most large organizations take out Officers' and Directors' Liability Insurance.
- Larger Friends groups often do the same.
- Many smaller Friends groups feel the expense of this type of insurance would not allow them to donate the majority of the funds raised to their library and so don't purchase insurance.

Relationship between Friends, Library Board and Staff

- The relationship between the Friends, the Library Board and staff should be clear.
- A Memorandum of Understanding or an informal agreement between the Friends and the Library Board is helpful for everyone and leads to a greater level of collaboration.

FOCAL Working Relationships Toolkit

<http://www.accessola.org/web/Documents/FOCAL/Resources/Conference%20Archives/Friends%20Groups/Working%20Relationships%20Toolkit-2014.pdf>

Relationship between Friends, Library Board and Staff

- Whether the library is responsible for volunteer management, whether the Friends are responsible for their own volunteers, or whether it is a shared responsibility, everyone involved should have a clear understanding of who does what. Good communication is critical.
- A robust volunteer management process by all parties will ensure less risk and fewer misunderstandings about roles and responsibilities.

The Right Fit

- If a library or a Friends group is hoping to attract the right volunteers in 2015 and beyond, it is important to have measures in place that fit your organization's culture, human resource capacity, risk assessment and volunteer philosophy.
- If volunteers feel comfortable with how you recruit, screen, train and listen to them, they will fit in well and will stay with your organization longer.

Friends of Canadian Libraries

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