

ORGANISATION NAME

VOLUNTEER RECORDS MANAGEMENT POLICY

Introduction:

For the purposes of this policy, records are various types of information submitted by applicants or volunteers, and/or collected or created by staff relating to individuals or groups applying to or serving as a volunteer with Organisation Name.

The policy is to provide guidance on effective recordkeeping practices. Information contained in the records enable reporting and decision-making, along with satisfying accountability requirements for Federal and Provincial authorities, funding organisations and Organisation Name's Board of Directors. Records must be created and/or collected, organised, retained, and safeguarded in a manner that enables their longer-term availability and usefulness.

This policy is intended for use by Organisation Name's staff, volunteers, consultants and contractors.

Policy Statement:

Record Formats

- This policy relates to all volunteer records regardless of the format they are in, including but not limited to:
 - Physical paper;
 - Email;
 - Digital documentation;
 - Video or audio recordings;
 - Copies of text messages.

Access and Security

- Organisation Name undertakes to keep any and all volunteer records in their care confidential and secure.
- Access to records will be limited to the volunteer's direct supervisor and/or the leader of volunteers or their approved designates.
- Volunteers and applicants have the right to request access to their own records at any time, and to receive that access within one week of Organisation Name receiving that request in writing.

Included Information

- A volunteer's record **must** include the following information:
 - Name;
 - Preferred contact information;
 - Emergency contact name and information;
 - In the case of underage volunteers or applicants, a signed consent form; and

- In the case of volunteers working with vulnerable persons, a satisfactory police and Vulnerable Sector check. Any cost associated with these checks will be covered by Organisation Name.
- A volunteer or applicant's record **may** include, but not be limited to, information such as:
 - Application forms;
 - Mailing address and secondary contact information;
 - Availability times and preferences;
 - Skills and qualifications;
 - References;
 - Past and current roles;
 - Hours served;
 - Notes on attendance;
 - Awards and commendations;
 - Performance feedback provided to the volunteer;
 - Notes on conduct and/or conflicts;
 - Notification and details of termination of involvement.

Excluded Information

- The following information should **not** be included in a volunteer or applicant's record:
 - Any unsubstantiated comments or opinions about the volunteer;
 - Any comments about aspects of the volunteer's past, behaviour, person or lifestyle that do not have a direct impact on their volunteer service;
 - Any comments, opinions, or information that are contrary to protected human rights categories;
 - Any information that you are unwilling to have the volunteer see.

Retention and Disposal

- Records shall be kept for all applicants and active volunteers.
- If an applicant does not proceed with volunteering, their records are kept for six months, then disposed of.
- If an active volunteer decides to terminate their involvement for any reason, their records are made inactive and kept, in accordance with legal requirements, for seven years, then disposed of.
- If an active volunteer has their involvement terminated by Organisation Name, their records are made inactive and kept for a minimum of seven years. In the case of any legal ramifications, or expected legal ramifications, of the termination, this may be extended.
- Disposal shall involve deletion of all digital, audio or video records, and shredding of all paper documentation.