

<b>STATEMENT of POLICY</b>			
Manual:	Catalyste+	Policy No.	<b>7.4</b>
Section:	Volunteer Services	Approved:	March 1, 2021
Subject:	<b>Volunteer Roles, Responsibilities &amp; Conduct</b>	Effective:	
Issue to:	All Manual Holders	Page:	1 of 4
		Replaces:	August 17, 2017
Approved by:	Leadership Team	Dated:	

## **1 Purpose**

- 1.01 This Statement of Policy is intended to state organizational expectations with respect to volunteer roles and responsibilities and to provide guidelines for volunteers acting on behalf of the organization, ultimately aiming to:
- Ensure the completion of successful assignments and in-house duties
  - Ensure equitable treatment of volunteers
  - Minimize the potential for abuse of volunteers, clients, and staff
  - Ensure that clients benefit from the efforts of CAs and that funders will be favourably disposed to Catalyste+

## **2 Scope**

- 2.01 This policy applies to all staff, volunteers and board of directors.

## **3 Policy**

- 3.01 Upon enrolment as a Catalyste+ Advisor (CA), or as a volunteer working in any Catalyste+ office, all volunteers must comply with all of Catalyste+'s policies, procedures and protocols, including PSEA principles, and remain in good status regarding Catalyste+'s Advisor eligibility criteria. . Volunteers who do not comply with any terms below or in the aforementioned agreements will be subject to disciplinary measures, up to and including removal from the database or dismissal from in-house duties.
- 3.02 Volunteers shall perform duties, special projects and roles with direction from, and on behalf of, Catalyste+, without compensation (or the expectation of compensation) beyond reimbursement for approved out-of-pocket expenses. Volunteers shall have no economic or other beneficial interest in the services they perform.
- 3.03 Volunteers understand that their time and expertise are deployed within a framework of policies, procedures and targets established and/or approved by the Catalyste+ Board of Directors

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- 3.04 Volunteers will do their utmost to meet client needs and strive to achieve the best results, recognizing that the interests of clients are given priority.
- 3.05 Volunteer performance will be monitored by Catalyste+ staff to ensure the highest standards of service are met; and for adherence to the Advisor Agreement.
- 3.06 When a volunteer has had an unsatisfactory assignment or office evaluation, the volunteer will not be used on any subsequent assignments or in-house roles until the source of the complaint has been resolved to the satisfaction of management.
- 3.07 The CA's role is to serve the client as an advisor, in accordance with Catalyste+'s terms of agreement with the client. The CA must not make any commitment to the client beyond these terms without prior approval from Catalyste+.
- 3.08 The CA must not undertake any activity that places him/her in the role of employee or agent of the client. Such activities include:
- The CA must not sign any document that could incur liabilities for the CA and Catalyste+.
  - The client's letterhead must not be used for any letter or report signed by the CA.
- 3.09 While on Catalyste+ assignments, CAs shall devote their working time and energies to their assignment. They will not perform service for others, nor acquire or maintain financial interest in, or become a competitor of the client (assisted enterprise).  
Recommendations made by the CA to an assisted enterprise (with respect to such matters as the purchase of equipment or other assets, or the employment of services to others) must be based upon the needs of the assisted enterprise and not upon any personal interest of the CA.

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- 3.10 A supplemental Conflict of Interest agreement must be signed by the CA prior to departing for an assignment. CAs must notify staff of any potential conflict of interest.
- 3.11 Once a CA has been client-approved for an in-country assignment, they will be automatically withdrawn from consideration for other in-country assignments scheduled for the same period.
- 3.12 All communications between the client and the CA will be coordinated through the appropriate staff.
- 3.13 Catalyste+ will not incur costs associated with a spouse or other family member of a CA traveling to the location of an assignment. All costs must be assumed by the CA. In addition, Catalyste+ staff will not assume responsibility for any travel arrangements for the family member of a CA. An exception may apply in the case of long-term assignment for which provision has been made by a funding partner for a spouse to accompany a CA. In this case, certain costs may be covered at the discretion of the Program Manager. Children under the age of 18 are not permitted to accompany a CA on assignment unless there is another adult responsible for them.
- 3.14 CAs may accept modest tangible gifts from clients offered in appreciation of their participation on an assignment.
- 3.15 CAs on International assignment will not be entitled to any preferred status in any of the recipient countries. As no salary payment is involved and all receipts reflect necessary assignment expenses there will be no tax impact on the services of CAs in either the recipient country or Canada.
- 4 Responsibility**
- 4.01 It is the responsibility of the volunteer to understand and adhere to the expectations associated with their role.

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4.02 It is the responsibility of all staff involved with the management of volunteers to offer support to volunteers and to communicate with volunteers as required.

4.03 It is the responsibility of the Sr. Manager, Volunteer Services to maintain visibility of the contribution of volunteers to the organization and to arrange for volunteer recognition mechanisms.

4.04 It is the responsibility of the CEO to ensure that all complaints involving volunteers are handled in accordance with this policy, in a fair and equitable manner.

4.05 It is the responsibility of the department management to ensure that staff understand their responsibilities to volunteers.

## **5 Definitions**

5.01 “**Staff**” includes all Full Time & Part Time employees, contract employees, independent contractors.

5.02 “**Volunteers**” Includes all in-house and project assignment volunteers

5.03 “**Assisted enterprise**” refers to a client or partner that is the designated beneficiary of Catalyste+ programs or services.

5.04 “**Conflict of interest**” refers to a situation where an individual or a close relative of the individual has a personal stake in a particular decision or direction being taken by the organization and has some degree of influence over that decision or direction.

5.05 “**Disciplinary measures**” of Catalyste+ volunteers may include a note in the volunteer’s file, a warning, or removal of the volunteer from in-house duties and/or the database.

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## 6 References and Related Statements of Policy

Policy No. 1.8 – Confidentiality & Privacy

Policy No. 5.3 – Expenses

Policy No. 2.2 – Ethics

Policy 7.7 – Prevention of Sexual Exploitation & Abuse

Policy No. 7.4 Volunteer Breach of Conduct Procedure

## 7 Appendices

7.01 Supplementary Agreements (Advisor Agreement & Conflict of Interest)