



**LUPUS**  
**ONTARIO**  
Life Without Lupus

ar

**VOLUNTEER  
POLICIES  
and PROCEDURES**

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## 1.0 Orientation

### Mission and Vision

Lupus Ontario's mission is to provide vital support, education, awareness, advocacy, and research through the fundraising efforts of our staff and volunteer community to help those with lupus live longer, healthier, and better lives. *Lupus Ontario's vision is Life Without Lupus.*

### Definitions

Lupus is an incurable, disabling and potentially life-threatening autoimmune disease, subject to flares and remissions, which can attack any organ of the body in a pattern that differs greatly from person to person.

### Assumptions

Lupus Ontario acknowledges the following assumptions:

- That although lupus is a serious disease that affects men, women, and children in Canada, it is still relatively unknown.
- That prognosis greatly improves with early diagnosis, treatment, and care.
- That lupus organizations are valuable members of the resource team available to people who have lupus, their families and friends, and to health professionals.
- That lupus organizations exist to meet the needs of those affected by lupus for acceptance, education, support, community, advocacy, and hope.
- That Lupus Ontario can best serve the larger lupus community when working in a provincial and cooperative national framework.
- That knowledge, self-knowledge and responsibility increase an individual's success for total wellness.
- That Lupus Ontario has a commitment to excellence.
- That a cause and a cure can only be found through research or the funding of research.

### Governance

Lupus Ontario is governed by a 15-member volunteer board to provide governance, set the strategic plan, and execute on major initiatives. The board members are located throughout the province and supported by our staff members.

More information on Lupus Ontario's Governance can be found on our website:

<https://www.lupusontario.org/governance/>

## Education and Literature

Lupus Ontario is dedicated to connecting Lupus patients and their loved ones with resources, education, and support to help manage the disease. Our monthly newsletters update the community on ongoing Lupus research, upcoming events, highlight Lupus warrior's stories, and connect patients to resources and support throughout Ontario. Lupus Ontario also hosts webinars and podcasts throughout the year with community members and medical professionals discussing Lupus issues, tips on managing Lupus, and updates on research. There is an annual virtual symposium which provides the latest information related to a specific theme related to lupus diagnosis, treatment, and lifestyle management.

Visit our website for more information and resources:

<https://www.lupusontario.org/education/>

## Advocacy

In 2021, Lupus Ontario and a group of volunteers lobbied the Ontario Government to recognize Lupus Awareness Day on May 10. Every year on that night we arrange for landmarks across the province to be lit in purple in recognition of this day.

Based on input from the Medical Advisory Board, Lupus Ontario advocates for better access to medications and care for lupus patients in Ontario.

## Our History

Lupus Ontario arose from a need for support, education, and awareness. This gap was filled in 1978 by a dedicated group of patients. Lupus Ontario is a volunteer organization that started as the Ontario Lupus Association, incorporated provincially in 1998 and amalgamated with the Hamilton Lupus Society in 2004. Honey Agar was a founding member and our visionary first president whose leadership started Lupus Ontario. The first Lupus Conference was held in 1983 to raise support, education, and awareness.

Lupus Ontario continues to fund hospital clinics, education materials and symposiums, increase awareness through media and speaking engagements, research through the Lupus Ontario Geoff Carr Research Fellowship and to pay for support staff and materials. We strive to support those living with lupus and continue our work towards a Life without Lupus.

Visit our website for a more detailed history: <https://www.lupusontario.org/our-history/>

## 2.0 Guiding Principles for Volunteer Involvement

### Guiding Principles of Volunteerism:

- Recognize that volunteers are a vital human resource and will commit to the appropriate infrastructure to support volunteers.
- The organization's practices ensure effective volunteer involvement.

- The organization commits to providing a safe and supportive environment for volunteers.
- Volunteers make a commitment and are accountable to the organization.
- Volunteers will act with respect for the cause, the stakeholders, the organization and the community.
- Volunteers will act responsibly and with integrity and are subject to the Lupus Ontario Code of Conduct.

## **Definition of a Volunteer**

A Lupus Ontario volunteer is anyone who performs a task at the direction of, and on behalf of Lupus Ontario without compensation or expectation of compensation beyond reimbursement of approved expenses, in the belief that their activity is beneficial to others as well as satisfying to themselves. A volunteer must be officially accepted by Lupus Ontario prior to the task. A volunteer shall not be considered as an official agent or representative of Lupus Ontario unless specifically authorized.

## **Our Commitment to Volunteers**

Lupus Ontario has been built by volunteers and recognizes the importance of extensive involvement of both volunteers and staff to realize its mission. Lupus Ontario, as a provincial voluntary organization, provides a means for education, support, public awareness, advocacy, and research.

### **Lupus Ontario believes:**

- That volunteers have a unique and essential contribution to make to all aspects of lupus work.
- That it is the complementary contribution of staff and volunteers which enables us to deliver a high quality of service to people with lupus, their families, and the community.
- That the profile of our volunteer force should reflect the profile of the community in order that Lupus Ontario can benefit from a wide range of skills, experience, and perspectives and have the greatest impact on the community.
- That volunteers should be able to participate in the work of Lupus Ontario solely on the basis of their ability to contribute. There should be no discrimination on any other basis.
- That, in particular, those currently affected by lupus should be enabled to contribute their knowledge and skills through volunteering.
- That volunteers and staff will flourish in an environment of:
  - respect, listening and openness to new ideas,
  - willingness to give and take criticism,
  - responsiveness to the changing environment.

### **Therefore, Lupus Ontario intends:**

- To develop a positive and enthusiastic attitude to volunteering throughout the organization, with a clear common vision of what we are trying to achieve,
- To reach a common understanding of the role of volunteers within the organization,
- To ensure that volunteering is led jointly by staff and volunteers and that volunteers are involved in all aspects of the organization's work,
- To adequately resource volunteer activities,
- To enable people with lupus to participate in the work of the organization through volunteering.

### **Lupus Ontario Undertakings**

Lupus Ontario recognizes the complexities involved in working with volunteers and, therefore, undertakes to ensure that all staff are required to work with volunteers as a condition of their employment and, where appropriate, are trained to do so.

It also undertakes to adopt **best practices** in the recruitment, selection, orientation and development, ongoing support, evaluation, and recognition of volunteers.

In addition, Lupus Ontario undertakes:

- To match the skills, experience, and aspirations of volunteers to their work in the organization,
- To provide appropriate support for volunteers,
- To establish mechanisms to gain systematic feedback from volunteers,
- To establish and maintain clear, accessible channels of communication,
- To ensure that volunteers are not out-of-pocket as a result of working for Lupus Ontario.

### **Rights and Responsibilities**

The Board of Directors acknowledges and supports the vital role of volunteers in achieving the organization's purpose or mission.

Lupus Ontario volunteers have the following rights and responsibilities:

#### ***Volunteer Rights:***

- Receive adequate information with regard to assignments
- Be offered a suitable project, task or job
- Have access to clarity of direction and/or direct supervision
- Receive respect and support
- Receive recognition and feedback
- Be reimbursed for approved out-of-pocket expenses
- Provide feedback regarding their volunteer role

- Have personal information kept confidential
- Work in a safe and healthy environment

***Volunteer Responsibilities:***

- Be reliable and responsible
- Consult with supervisor, when necessary
- Ask for support when needed
- Participate in required learning opportunities
- Support and abide by Lupus Ontario’s policies
- Show enthusiasm, loyalty, and belief in the work of Lupus Ontario
- Inform Lupus Ontario of any medical condition or special needs that may affect the volunteer’s ability to undertake certain tasks
- Appreciate and respect the confidential nature of information that may be acquire in the course of duties
- Agree to work in a safe and healthy way and not jeopardize the health and safety of self and others

**Code of Conduct**

The Lupus Ontario Code of Conduct applies to all volunteers of Lupus Ontario its staff and any third-party service providers in face-to-face contact with our clients. **All volunteers should familiarize themselves with the external policies on the website.**

Strict observance of the Code is fundamental to the activity and reputation of Lupus Ontario. It is essential that all direct service program volunteers (those in face-to-face contact with Lupus Ontario’s clients), support centres, Board members, staff and any other third-party service provider in face-to-face contact with our clients adhere to this Code.

**All volunteers with High-Risk roles, board members, and staff will sign the Code of Conduct.** The signed Code of Conduct will be filed.

This Code should also be included in the orientation of all new staff, volunteers, and board members. Should the individual resign their position with Lupus Ontario, a new Declaration must be signed upon their return to a position with the organization, or any of its support centres.

Please click on the link [here](#), download the Code of Conduct, print and sign, and return to Volunteer Supervisor.

## 3.0 Policies and Procedures

### 3.1 Recruitment

#### **Purpose:**

Lupus Ontario will strive to ensure that all volunteers participate in activities which are meaningful and positive for both the volunteer and Lupus Ontario.

#### **Policy:**

Volunteers should be able to participate in the work of Lupus Ontario solely on the basis of their ability to contribute. There should be no discrimination on any other basis.

Volunteers may be recruited through either interest in specific functions or through a general interest in volunteering which will be matched with a specific function.

#### **Procedures:**

1. Volunteer opportunities will be advertised in the newsletter, at Lupus Ontario events, on the Lupus Ontario website, or on the websites of affiliated organizations (e.g. Charity Village, volunteertoronto.ca, etc.).
2. Applicants will respond in writing by completing the Lupus Ontario Volunteer Application Form on the Lupus Ontario website.
3. Volunteer Committee will have a description of the position which will include the position title, summary of duties, supervisor, roles, and responsibilities, working location and environment, skills, knowledge and attitudes required, duration of position, time commitment, training, benefits and rewards, reference requirements, probationary period (if any), and review process.
4. If a candidate is interviewed and Lupus Ontario decides that they are not a fit for the position, a written response should be sent to the candidate thanking them for their interest.

### 3.2 Screening

#### **Purpose:**

The volunteer screening process is intended to a) ensure a safe and secure environment of everyone involved in the organization and b) that applicants are appropriately matched to the positions available. All volunteers will be screened in a manner appropriate to the policy or service assignment being performed according to Lupus Ontario guidelines. Screening decisions will be made based on the risks inherent in the project, task or job assigned.

#### **Policy:**

Screening procedures may include reference checks, background criminal checks, etc. Volunteers will be asked to provide written authorization for disclosure of information.

Prospective volunteers may be required to submit to a Police Record and/or Vulnerable Sector Check prior to acceptance. A signed letter confirming intent to volunteer will be given by Lupus Ontario prior to requesting the check, if required. In the event that a Police Record / Vulnerable Sector Check reveals a criminal past, the Head of the Volunteer Committee may reject the applicant or if they feel that the applicant history demonstrates that they have made positive changes in their lives and sincerely want to volunteer with Lupus Ontario, the record check can be referred to the Governance Committee for further assessment of risk.

Where a fee is required to obtain a Police Record and/or Vulnerable Sector Check, Lupus Ontario will reimburse the volunteer for this fee.

### **Procedures:**

1. All applications for volunteer positions will be reviewed for suitability to the position applied for or for other available positions. If the applicant appears suitable, they will be requested to appear for an interview conducted by a Board or staff member in a supervisory role. Everyone who applies will receive a response from Lupus Ontario.
2. Every interviewed applicant will be contacted to advise of the outcome of the interview process within 10 days of the interview.
3. If the applicant is deemed suitable the required additional reference, Police Record and/ or Vulnerable Sector Checks will be requested by the Volunteer Committee Head. The completed PRC should be sent to the Head of the Governance Committee for filing.
4. Final acceptance of the volunteer by Lupus Ontario will be provided in writing and include the formal description of the position.

## **3.3 Orientation, Direction and Supervision**

### **Purpose:**

Lupus Ontario recognized that orientation and supervision are important in ensuring that volunteers understand their role and have access to guidance and support when needed.

### **Policy:**

Lupus Ontario will ensure that volunteers receive appropriate levels of orientation and supervision according to their task and are given regular opportunities to receive and give feedback.

### **Procedures:**

1. All volunteers will be assigned to a direct supervisor.
2. All volunteers may participate in an orientation session and receive the required training required to perform their duties as outlined in the position description. The training will be delivered by a Board or staff member in a supervisory role. The participants may be asked to evaluate the training provided so that Lupus Ontario can improve on the training delivered and identify additional training required.

3. Additional training may be provided throughout the duration of the volunteer position.

### 3.4 Reimbursement of Expenses

#### **Purpose:**

Lupus Ontario recognizes that volunteers may incur expenses while conducting business on behalf of Lupus Ontario.

#### **Policy:**

In this regard, Lupus Ontario provides volunteers with reimbursement for **pre-approved** out-of-pocket expenses and travel costs associated with the business of Lupus Ontario. It is important that all expenses claimed are supported by sufficient documentation to justify the expense. Any expenses incurred requires approval from an Executive Board member or staff. Any expenditure over \$500 requires approval from an Executive Board member.

In order for volunteers to be reimbursed out of pocket expenses, they must:

- Only submit requests for reimbursement of expenses covered by this policy.
- Complete the Out-of-Pocket Expenses and Mileage form, attach receipts and mail/e-mail the complete package to the Lupus Ontario office, attn: Office Manager

Expenses that will be reimbursed with appropriate documentation:

#### ***Travel***

The types of travel expenses that will be reimbursed include air, train, taxi, bus and automobile as the travel relates to getting to and from a scheduled Lupus Ontario meeting. Every volunteer is strongly encouraged to opt for the most economical and reasonable means of transportation available.

1. **Airfare/train/bus**

Airfare, train, and bus fares will be reimbursed on economy rates only. Every opportunity to access seat sales, discounts, conference rates and advanced bookings is recommended. Receipts must be attached to the Lupus Ontario Out of Pocket Expense form and submitted to the Lupus Ontario office for reimbursement.

2. **Automobile:**

Automobile travel expenses will be reimbursed at the current Lupus Ontario per kilometre rate set by the Board of Directors. Mileage must be filled out on the Lupus Ontario Out of Pocket Expense form and submitted to the Lupus Ontario office for reimbursement.

For parking fees, toll charges, etc., receipts must be submitted. If a parking meter was used, please indicate the amount of money inserted into the meter and the time allowed.

## ***Accommodations***

Costs associated with accommodations will be reimbursed provided accommodations are a requirement in order to do business on behalf of Lupus Ontario. Receipts are required for all hotel/motel accommodation. Wherever possible, volunteers are encouraged to use reduced rates.

In certain instances, it is understood that volunteers have family or friends who are willing to accommodate them. In these instances, a moderate gift may be purchased as a thank you or the volunteer may host a dinner.

## ***Meals***

Reasonable and actual meal expenses incurred while doing business on behalf of Lupus Ontario will be reimbursed upon submission of receipts. If there is more than one person being claimed, details as to the nature of the business and attendees must be indicated on the back of the original receipt. Lupus Ontario will not cover the cost of alcohol.

The same care should be taken when leaving a gratuity as if it were a personal expense.

## ***Miscellaneous Expenses***

- Supplies, postage, photocopying, courier, etc.
- Communication – Lupus Ontario related telephone or facsimile charges

All claims for these expenses are to be itemized, and receipts are to be submitted.

## ***Receipts***

Original receipts or scanned copies must be submitted with the Lupus Ontario Out-of-Pocket Expense form. Canada Customs and Revenue Agency's HST regulations state that only expenses documented by an original receipt may have the HST rebated. The volunteer should keep original copies for seven years.

## ***Authorizations***

The volunteer's supervisor will approve all volunteer expense reports. If required, the Office Manager, the President, Vice President, or Treasurer may approve expenses.

## **3.5 Health and Safety**

### **Purpose**

Lupus Ontario, along with its employees and volunteers, must take reasonable precautions to ensure that the workplace is safe. The organization complies with all requirements for creating a healthy and safe workplace in accordance with the Occupational Health and Safety Act of Ontario.

### **Policy**

Volunteers who have health and safety concerns or identify potential hazards should contact their supervisor or the Office Manager.

### 3.6 Harassment

Refer to the Harassment Policy here: [Lupus Ontario Violence and Harassment Policy](#)

### 3.7 Problem Resolution

#### Purpose

Lupus Ontario is committed to sustaining a positive work environment in which employees and volunteers work constructively together. The problem resolution policy and process have been established as a foundation for ensuring that the work environment remains positive.

#### Policy

The problem resolution policy is intended to:

- Provide the opportunity to resolve a conflict or complaint quickly, fairly and without reprisal,
- Improve communication and understanding between employees and volunteers; and between volunteers and their supervisor,
- Ensure confidence in management decisions by providing a mechanism whereby management decisions can be objectively reviewed,
- Support a positive work environment by allocating supervisors responsibility for preventing and resolving conflicts and complaints,
- Identify organization policies and procedures which need to be clarified or modified.

Volunteers who are experiencing a work-related conflict or have a complaint are encouraged to resolve it through discussions with the management or Board member assigned to the committee the volunteer serves on. All requests for conflict resolution, complaints and appeals shall be fully investigated, and a reply will be given as quickly as possible.

Penalty or retaliation against a volunteer who initiates conflict resolution or makes a complaint or participates in a problem resolution investigation will not be tolerated and will be subject to disciplinary action.

#### Procedures

**Note:** *Although not required, volunteers are encouraged to follow the informal approach to problem resolution prior to making a formal complaint.*

*Informal conflict resolution and complaint process:*

1. Volunteers who experience a work-related conflict or who have a complaint should first attempt to discuss the matter with their Direct Supervisor (i.e. the Board or staff member responsible for the Committee that the volunteer is serving on). In some situations, this may be difficult or inappropriate. In these cases, the volunteer may

request a meeting with the next level of management or the President of the Board of Directors or a designated representative to discuss the problem. Before escalating the issue, the volunteer should document the situation in writing.

2. The person designated to address the issue will analyze the merits of the conflict resolution request or complaint, and within five (5) working days will meet with the volunteer to inform him/her of the proposed plan of action.
3. If the volunteer is not satisfied with the plan of action proposed or if the plan does not succeed in resolving the issue, the issue will be discussed by the Board, and a resolution will be agreed on.

## 3.8 Volunteer Recognition

### Purpose

Volunteer activities are a key part of the services Lupus Ontario strives to deliver to the lupus community. Volunteer contributions should be recognized on a regular basis in a way that will be meaningful to the volunteer.

### Procedure:

1. Each volunteer's direct supervisor is responsible for providing input to the recognition process.
2. Methods of volunteer recognition include: written thank you letters to the volunteer, letters of reference, nominations for community service awards, descriptions of volunteer's work on the Lupus Ontario website or newsletter, volunteer appreciation certificates or small gifts and the annual President's Donna Chu Memorial Award.

## 3.9 Termination of a Volunteer

### Purpose

Lupus Ontario strives to provide high quality services to its clients. Volunteers who do not comply with the Code of Conduct or who fail to satisfactorily perform their duties will be terminated.

### Policy

#### Termination for Cause

A volunteer may be terminated after consultation between volunteer's direct supervisor and the head of the Committee that the volunteer is assigned to for breaches of Lupus Ontario's Code of Conduct including but not limited to:

- Gross misconduct or insubordination
- Sexual harassment
- Performance of duties while under the influence of alcohol or mind-altering drugs
- Theft

- Misappropriation of funds
- Falsification of records
- Misrepresentation of personal information
- Illegal, violent, or unsafe actions
- Abusive treatment of a stakeholder or co-workers, either physical or emotional
- Failure or inability to project a positive image of the services of Lupus Ontario

### **Resignation**

Volunteers may resign from their duties at Lupus Ontario at any time. They will provide a written notice of resignation to their direct supervisor in advance of their departure to the extent possible either electronically or in hard copy.

### **Employer Property**

On the departure of the volunteer, all items of any kind created or used pursuant to the volunteer's service or furnished by Lupus Ontario including but not limited to electronics, documents and equipment that are the exclusive property of Lupus Ontario, shall be surrendered to the direct Supervisor within a reasonable amount of time.

### **Confidential Information**

All volunteers collecting personal information must keep that personal information confidential in accordance with the Lupus Ontario [Code of Conduct](#) and Lupus Ontario [Privacy Policy](#).