



Volunteer
Toronto

Advanced

Volunteer Boundaries & Dismissal

Resource Guide & Workbook

Compiled by Engaging Organizations Department

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Using this Resource Guide & Workbook

The Volunteer Boundaries & Dismissal resource guide & workbook has been compiled by Volunteer Toronto to help community groups, non-profits and charitable organizations with the basic tools to create effective boundaries and plan for dismissal of volunteers if necessary. Each resource has been selected to give you an idea of the various needs of each step of the process. It is important to remember that these are guidelines informed by best practices; you can adapt them to your situation as needed.

Volunteer Boundaries & Dismissal

Resource Guide & Workbook

Volunteer boundaries refer to behaviour that is considered “in-bounds” or acceptable, and “out-of-bounds” or unacceptable. They are often understood, unspoken and vital to the success of your volunteer program. Boundaries keep volunteers focused on the role and help protect clients, volunteers and the organization from risk. Sometimes, however, volunteers can break these boundaries – and the consequences could lead to dismissal.

This workbook will go in-depth into understanding and creating boundaries, making sure volunteers are informed and dealing with volunteers violating those boundaries. There will also be an analysis of dismissing volunteers, how to do it formally and professionally and how to manage the impact of dismissal on other volunteers. Here are the contents of the workbook:

Volunteer Boundaries

- Dimensions & Types of Boundaries *Page 2*
- Creating Boundaries *Page 4*
- Informing Volunteers *Page 6*
- Expectations & Consequences Worksheet *Page 7*
- Violating Boundaries *Page 8*
- Mending Boundaries *Page 10*

Dismissal

- Dismissal Policy & Procedure Sample *Page 11*
- Incident Report Template *Page 13*
- Dismissal Letter to Volunteer Template *Page 15*
- Dealing with Impact *Page 16*

Dimensions & Types of Boundaries

For the purpose of this workbook, we'll look at the “dimensions” and “types” of boundaries. Dimensions are the relationships where boundaries can exist in your program. Types are the actual distinctions of boundaries themselves.

Use this chart to get a better understanding of the relationships that form the different dimensions of boundaries, and add your own example boundaries.

Volunteers and...	Explanation	Examples
Clients	Volunteers may be working one-on-one with clients, in a group setting, or interacting with different groups of clients depending on the role and work. These boundaries could depend on the level of supervision the volunteer will have when interacting with clients.	• Volunteers cannot form friendships or romantic relationships with clients • Volunteers cannot tell clients what kind of medical assistance they require •
Staff	Volunteers may be managed by staff other than the volunteer manager, or they may interact with different staff in their work in a variety of ways.	• Volunteers cannot connect with staff on social media • Volunteers cannot take up staff members' time for non-role-related reasons •
Other Volunteers	In many cases, volunteers will be working with each other on activities, events and programs – sometimes their relationships can extend beyond the work of the organization, and those relationships can become present in their work.	• Volunteers cannot discuss personal matters while on shift • Volunteers cannot discuss client information with each •
Volunteer Managers	Separately from other staff, volunteers may interact with the volunteer manager or their direct supervisor frequently – in most cases, this relationship should be professional and hierarchal.	• Volunteers cannot form personal relationships with their supervisors • Volunteers cannot ask for favours or special treatment from managers •

Use this chart to distinguish the four types of boundaries and add your own examples.

Boundary Type	Definition	Examples
Physical	Entering someone's personal space, touching someone without consent, having any kind of physical interaction that would be reasonably deemed inappropriate – this includes romantic physical interactions.	• Volunteers are not allowed to touch or enter the personal space of clients •
Emotional	When someone is made to feel badly, called names or given an inappropriate or hateful label; when someone is told their life or work or some aspect of themselves if bad, are given negative feedback on their feelings.	• Volunteers are not allowed to call staff or clients hurtful names •
Mental	Making – or helping to make – decisions for others, telling someone what to think or do, providing advice or guidance that is unsolicited, going beyond the intended capacity of the role. These boundaries exist to allow people to make their own decisions without influence by a person in a position of authority.	• Volunteers are not allowed to medically diagnose clients, or insinuate clients are in need of medical care •
Ethical	Overstepping the work of the organization or the role, helping too much or entering into an inappropriate relationship. Ethics should be guided by your mission and the work of the volunteer program; these boundaries are in place to ensure the goal of the mission stays intact.	• Volunteers are not allowed to provide extra care or service to clients outside of their shift, especially under the name of the organization •

Creating Boundaries

To create meaningful, appropriate and valid boundaries, you need to understand the risk of your volunteer's activities. When planning volunteer roles – before assigning volunteers to them – consider the following questions:

- Who are the people involved?
Volunteers, staff, clients, community members
- Who is in a position to harm the organization?
Volunteers as ambassadors of the organization, a client leaving a bad review, etc.
- What is the activity?
Actual duties, tasks, responsibilities of the volunteer
- Where does the activity take place?
In your office/facility, at a satellite location, in client homes, etc.
- How often will someone oversee the activity?
Level of supervision, other volunteers/staff around, etc.
- How can boundaries be maintained?
Clients made aware of boundaries in place, reminders of boundaries in communications, etc.

Once you've considered the risks, you can create boundaries based on a basic structure. They should always be connected to a specific risk or set of risks, and they should be specific to the role, not the volunteer. Use the templates on page 5 to create boundaries that you can communicate to volunteers.

Example

Volunteer Role	Friendly Visitor			
Relationship	With Client	With Staff	With Other Volunteers	With Manager
Boundary Type	Physical	Emotional	Mental	Ethical
Risk	Physical contact with clients could violate their personal space, physical wellbeing, medical condition or more, causing harm to the client			
Volunteers cannot/are not allowed to touch clients or enter their personal space.				

Volunteer Role				
Relationship	With Client	With Staff	With Other Volunteers	With Manager
Boundary Type	Physical	Emotional	Mental	Ethical
Risk				
Volunteers cannot/are not allowed to				

Volunteer Role				
Relationship	With Client	With Staff	With Other Volunteers	With Manager
Boundary Type	Physical	Emotional	Mental	Ethical
Risk				
Volunteers cannot/are not allowed to				

Volunteer Role				
Relationship	With Client	With Staff	With Other Volunteers	With Manager
Boundary Type	Physical	Emotional	Mental	Ethical
Risk				
Volunteers cannot/are not allowed to				

Informing Volunteers

After creating boundaries, you need to inform your volunteers of what they are and why they exist. Follow this chart to help you determine the steps to letting volunteers know about their boundaries – along with any other expectations.



Expectations & Consequences Worksheet

Every expectation should have a consequence for not being met – this can help you create more meaningful boundaries. Think about risk, your mission and your process of communicating boundaries to create expectations and associated boundaries in this worksheet.

What are some of your expectations?	What are some of your consequences?
How do you let volunteers know about your boundaries, expectations & consequences?	
Create three clear expectations/boundaries linked to your risk analysis & mission	
<i>Example:</i> In order to maintain volunteer focus on tasks and clients during shifts, volunteers must not use their personal cell phones while volunteering. 1. 2. 3.	
Create three clear consequences linked with your expectations	
<i>Example:</i> Volunteers who use their cell phones during shifts will receive a training session on the importance of volunteer focus in shifts to improve the lives of clients. 1. 2. 3.	

Violating Boundaries

Despite your best efforts to plan and communicate expectations, volunteers may still break boundaries. This may happen for a variety of reasons:

- Breaking the boundary sneaks up on them without a conscious decision to do so
- They see a perceived need they want to fill
- They disagree with the values and reasoning behind the boundary
- They don't realize they're violating a boundary
- Breaking the boundary fulfills an emotional need
- They did it before and no one said anything
- They are burning out or experiencing an intense life event

In reality, most volunteers tend to violate boundaries because of two core reasons:

Volunteers want to be helpful	Volunteers don't want to be helpless
93% of volunteers do so because they want to make a difference (the most common motivation for volunteers) and 60% are affected by the cause – volunteers want to be as helpful as possible in making a difference and serving your mission.	Clients might need additional support and volunteers can feel powerless – or like they've failed – if they can't or don't offer help. Volunteers may break boundaries because they think it's the only way to help the client more.
<i>Focus on Helpfulness</i>	<i>Decrease Helplessness</i>
It's important to focus on the helpfulness of the volunteer's role – acknowledging the impact and the power of their success. Consider: • How is the role helpful? • Why was the role designed the way it was? • What purpose do the boundaries serve? • How is ignoring boundaries unhelpful? • How do you communicate this? • What are the negative effects of broken boundaries on clients and the organization? Don't forget about your risk analysis (page 4) used to determine boundaries and that the boundaries you create will still allow the volunteer to be useful and helpful in their role.	Remember that boundaries might be broken because volunteers feel they want to do more, or see a need they want to fulfil. You can decrease helplessness by: • Getting an idea from volunteers of what issues arise often • Determining what needs your organization's work aren't meeting • Letting volunteers know where they can refer clients to meet specific needs • Preparing volunteers to say no to client requests that are outside the scope of the role • Letting volunteers know who to approach and talk to for advice

It is also important to consider the ways volunteers respond to boundaries, to help understand why volunteers didn't follow the rules. Take a look at the following reasons that volunteers might break boundaries. Volunteers:

- **Didn't know the rules** – the boundary wasn't clearly explained to them at the beginning of their engagement or they just didn't understand it
- **Didn't think the boundary mattered/didn't know why the boundary existed** – without a proper understanding of why the boundary was put in place, it's possible the volunteer didn't think the boundary was necessary
- **Thought their way was better** – as previously mentioned, volunteers don't want to be helpless; when they see a need they can fill, they may try to do so even if it falls outside of their responsibilities
- **Thought the boundary was less important than the results of ignoring it** – this is where a volunteer knows about the boundary, but thinks that crossing it is more important to the needs of the client/organization than the consequences, which is not often true; think of this as “asking for forgiveness instead of asking for permission”
- **Thought the boundary was a barrier to fulfilling their duties** – think back to avoiding helplessness and volunteers breaking boundaries to best meet the needs of their clients; volunteers could consider the boundary as a barrier to doing their job – of course, with an appropriate risk assessment, this should not be the case
- **Didn't believe there would be a negative consequence** – perhaps the consequences, although explained at the beginning and throughout the volunteer's engagement, aren't considered serious enough or realistic for volunteers
- **Didn't recognize the positive results of staying within the boundary** – there are positive benefits for volunteers performing and behaving well, and especially for not breaking boundaries; letting volunteers know and reminding them about the positive side of respecting boundaries can create stronger and more meaningful relationships and volunteer programs

SURPRISING REASONS FOR BROKEN BOUNDARIES

If you encounter a volunteer meeting with clients outside of their shift, they could be fulfilling a motivation for greater social interactions - or helping to meet a volunteer need for deeper relationships. Perhaps a volunteer had a pre-existing relationship with a client you didn't know about, or they simply weren't aware of the boundary in place. Find out from volunteers what boundary - if any - they think they broke to get a better understanding of their thought process. The results may surprise you and help you to rethink the way you plan and communicate your boundaries and expectations.

Mending Boundaries

When boundaries are broken, volunteers may want to fix the boundary and maintain their role and relationships with clients and the organization. This may not always be easy, but there are a few guidelines to help you. Use the chart below to determine how you might mend a boundary with a volunteer.

Guideline	How this works	How you'll do it
Provide feedback to volunteers on their behaviour	Let volunteers know how they're progressing in improving behaviour—check in with them while they work to mend relationships and boundaries = and give feedback on their work	<i>Your volunteer broke a boundary with a client and you've had them change roles; check in after one week to see how the change is going</i>
Show the volunteer your risk assessment	Let volunteers know why the boundary is necessary by displaying the steps of your risk analysis; help the volunteer to understand the risk to themselves, to clients and to the organization, as well as the impact of those risks on striving toward achieving the mission	
Ensure the volunteer agrees on the need to improve performance	Helping volunteers improve their performance requires an agreement from both sides that improvements need to be made; volunteers themselves should be part of the driving force to fix and maintain boundaries, even when they're the ones who broke them	
Work with the volunteer and the other party of the relationship	Mending the boundary could also include the other people involved, such as staff, clients or other volunteers, to understand the boundary breach and fix it; this keeps volunteers accountable to others in the organization and themselves	

Dismissal Policy & Procedure Sample

A dismissal policy and procedure is vital to ensure a consistent, transparent and appropriate dismissal process. This sample policy is based on a combination of Volunteer Toronto's volunteer dismissal policy and procedures with ideas from other organizations.

Purpose

To ensure that dismissal of volunteers is fair, equitable and reasonable based on the process herein and the expectations, responsibilities and consequences of volunteer actions.

Policy Statement

[Organization Name] has the right to dismiss any volunteer whose actions have not supported the vision and mission of the organization and/or who has violated *[Organization Name]*'s policies, procedures, boundaries and position responsibilities.

Application/Responsibilities

Volunteer coordinators within the organization will determine the responsibilities of each volunteer role – along with any associated expectations, boundaries, duties and rules that are appropriate. Volunteers will also sign a Code of Conduct for appropriate behaviour, revised annually by the Policy Review Team.

It is the responsibility of every volunteer coordinator and supervisor to ensure volunteers are aware of their expectations and responsibilities, and all possible consequences for failing to meet these expectations, breaching the Code of Conduct or a boundary, or inappropriate behaviour.

It is the responsibility of volunteers to understand their expectations and be aware of the dismissal policy and process to follow each step accordingly.

Procedures

Along with failure to comply with general policies & procedures and the code of conduct, the following is also considered grounds for dismissal:

- Illegal, violent and/or unsafe acts (will also involve Toronto Police Services)
- Theft of property or misuse of *[Organization Name]* funds, equipment or materials
- Being under the influence of alcohol or drugs while performing volunteer duties

Procedures Continued

1. Any instance of failure to meet the requirements of the role, behave within the boundaries and Code of Conduct and/or misrepresent or contravene the mission of [Organization Name] will be documented in the volunteer's file using an Incident Report. Each occurrence will be shared and followed-up with the volunteer. A plan will be created to improve behaviour and ensure instances aren't repeated.
2. If such occurrences are repetitive or frequent, the volunteer will be given a warning in person and in writing. This warning will be recorded in the volunteer's file.
3. Depending on the severity of the issue, the number of warnings before termination will vary –a standard consideration should be 2 warnings, as the volunteer will be given opportunities to improve after each and the failure to improve after the 2nd warning would warrant dismissal.
4. The duration between the last warning and informing a volunteer of their dismissal should be no more than 2 weeks – this depends on the volunteer's engagement (daily, weekly, monthly, occasional) and should still allow for volunteers to improve behaviour and performance if possible.
5. An appointment should be scheduled to inform the volunteer of the decision to dismiss them in person – present at this meeting will be the direct coordinator of this volunteer and one other member of senior staff. The volunteer is invited to bring another volunteer or any other person for support purposes. This meeting is to inform the volunteer of the decision, not to discuss or potentially change the decision.
6. The volunteer should be supplied with a confirmation of their termination in the form of a Dismissal Letter, signed by their supervisor and the Executive Director.

Forms

Incident Report (page 13)

Dismissal Letter Template (page 15)

Volunteer Code of Conduct

Incident Tracking Template

Even if you are not planning to dismiss a volunteer, you should track every incident involving the volunteer. An incident is any event or occurrence that, in this case, refers to volunteer behaviour or performance that is contrary to expectations (negative, boundary breaking, etc.). This will ensure any decisions you make for reprimand, performance coaching and/or dismissal are backed up with documentation of the volunteer's actions.

Example Incident Report

Date: March 12, 2016

Time: 2:00pm

Location: North York Office

Name(s) of individual(s) involved & roles: Petra (volunteer), Singham (staff)

Incident details:

Petra was working at the front desk of the office when Singham asked her to clean up a client accident in the back. Petra explained that it wasn't her job to clean up after clients or do any cleaning for the organization, and stayed at the desk for her role. Singham angrily ordered her to clean up but Petra refused, eventually swearing at Singham to let her do her job.

Boundary broken (if any):

Volunteers should refrain from using negative and inappropriate language during their shift.

Recommendation:

Petra's reaction came from a place of frustration, but she was right in not going to clean up because Singham told her to. Petra was reminded of the boundary and will continue her role. Singham will also be reminded about the roles of volunteers.

Format: Face-to-Face / E-mail , Phone Call **Note - Has this happened before?** Yes / No

Manager Signature

Individual(s) signature(s)

Date:

Time:

Location:

Name(s) of individual(s) involved & roles:

Incident details:

Boundary broken (if any):

Recommendation:

Format: Face-to-Face / E-mail / Phone Call / Note - **Has this happened before?** Yes / No

Manager Signature

Individual(s) signature(s)

Dismissal Letter to Volunteer Template

Part of making dismissal official is providing volunteers with a formal termination letter. You are not opening the topic up for conversation, but instead informing them of your decision. This should not come as a surprise as they have already discussed their performance, and perhaps failed to make improvements, before.

Have your dismissal letter delivered on organization letterhead and signed by the volunteer's direct manager or volunteer coordinator/manager as well as the Executive Director. You may include the reason for the dismissal in the letter, or allude to previous conversations – you should identify the policy, procedure or boundary referenced if you will identify the reason for dismissal. Use this template to help you create official dismissal letters for volunteers.

Addresses	This should include your logo (if not already on the letterhead), volunteer manager or ED name & organization address – also include the full name and address of the volunteer being dismissed
Informing	After a salutation, open the letter by informing the volunteer of the decision to dismiss/terminate/not-renew them. Note that this is in accordance with your organization's dismissal policy and other policies as relevant.
Specifics	If the volunteer has violated a boundary, broken rules or part of the code of conduct, and/or repeats negative or poor behaviour, you should cite the general reasoning (such as the policy) for the volunteer's dismissal. In more serious cases, you may want to provide even more specific details so that it is clear why the decision has been made.
Value Statement	Acknowledge that you appreciate the volunteer working with your organization and giving of their time and energy. If they had any kind of impact on the program, clients, community or organization, let them know.
Closing & Signatures	The letter should be signed off by the direct supervisor, volunteer manager/ coordinator, and/or Executive Director. The ED's signature should also be present, along with any other relevant names. Leave a space for the volunteer to sign to confirm they've read and understand the letter.

Dealing with Impact

Dismissal should be a real consequence – volunteers should know that breaking the rules could lead to their termination from your organization. However, if volunteers don't see anyone dismissed, they may not consider it a real and tangible consequence.

The impact of a volunteer's dismissal can be two-fold:

- A dismissed volunteer may have been a part of the organization and volunteer program for a long time, making a number of connections and holding a perceived sense of seniority – their absence will be felt and maybe challenged by some volunteers
- Volunteers may be surprised that dismissal actually occurred, and may have many questions about the process, the rules and how to ensure the same thing doesn't happen to them

A volunteer's dismissal will have an impact on your entire volunteer program – it's possible many volunteers may ask you why someone was dismissed. You should maintain the dismissed volunteer's privacy whenever possible, but you can share some details that may be useful to all volunteers. For example, if there was a specific rule within the organization that should be upheld by all volunteers, you can remind your volunteers that a consequence for breaking this rule is dismissal.

You should also remind volunteers about the dismissal policy and process, so that they are aware of the steps that have taken place for the dismissed volunteer and that everything followed the rules. Some volunteers may feel a volunteer was terminated for personal reasons, but you can remind volunteers that these decisions are based on the actions within the role and staying within expectations.

Be prepared for questions from volunteers about the rules and expectations – you should reiterate why some (if not all) rules and boundaries exist and the benefits they provide for the organization. You should link back to the mission whenever possible, reminding volunteers of the potential impact of their work on striving toward meeting your organization's mission and serving the community.

CERTAIN VOLUNTEERS

Some volunteers may have been with your organization for a long time - they may have even been volunteering since before you were the volunteer coordinator! Be mindful of the ways volunteers see each other and may rely on other, senior volunteers. The impact of dismissing one of these volunteers may be more profound on your program. Remember to reiterate the dismissal policy and procedure - don't give out personal and private information on what may have led to that volunteer's dismissal. If you need to remind all your volunteers of certain boundaries or expectations, the aftermath of this volunteer's dismissal could be a good platform.

Volunteer Toronto

Volunteer Boundaries & Dismissal

Resource Guide & Workbook

Next Steps

To continue your volunteer management journey, there are a number of other workbooks created by Volunteer Toronto to assist you every step of the way:

Basic

- Planning, Recruiting & Selecting
- Training, Supervising & Supporting
- Evaluating, Retaining & Developing
- Engaging Group Volunteers
- Professional Development for Managers of Volunteers

Intermediate

- Planning for Volunteer Involvement
- Volunteer Recruitment
- Volunteer Selection
- Training & Orientation
- Volunteer Retention & Recognition

Advanced

- Accessibility and the AODA
- Giving Volunteers Feedback
- Short Term Volunteers
- Long Term Volunteers

Check out our **Online Learning Centre** for a variety of courses to further enhance your learning and improve your practice - go to volunteertoronto.ca/?page=OnlineLearning

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