



# St. John Ambulance Saint-Jean

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April 2006

To: **National Management Team and Provincial Directors, Community Services**

Subject: **National Operating Policies and Procedures – Community Services” (NOPP-CS)**

Since its inception, many different forms of directives have guided St. John Ambulance volunteers in their day-to-day organizational life. Each was designed to provide commonalities across different geographical jurisdictions while maintaining strong national standards and a clear, visible national identity. Originally, these documents were entitled “Brigade General Regulations” and in the 1990 era were revised into the more flexible format of “St. John Canada Instructions.” Regardless of the decade, each document has always required updating and maintenance to reflect changes in both St. John Ambulance and in Canadian society.

Societal changes, recent changes in our organizational structure and, equally as important, changes in volunteerism in general, have resulted in the requirement to update the policies and procedures under which St. John Ambulance volunteers in Canada operate today. To this end, a working group made up of both senior staff and senior volunteers was formed under the direction of the National Management Team (NMT – Provincial/Territorial Council Chief Executive Officers/Executive Directors) with a mandate of creating a document that reflects modern, best practices in program delivery and volunteer management while respecting the realities of our organizational governance model. These experienced volunteers and staff have spent the past two years consulting with all levels St. John Ambulance across Canada and have conducted an exhaustive review of national policies, external sources and local needs. The end result of this process is a document that has been endorsed by the NMT for implementation in each Provincial/Territorial Council.

Over the coming months, National Office staff will be providing workshops in each Provincial/Territorial Council to introduce volunteers to the new “National Operating Policies and Procedures – Community Services” (NOPP-CS). These sessions may be of interest to instructors and employees as well. Once again, St. John Ambulance has demonstrated bold, innovative leadership through the production of our revised operational policies.

We look forward to your participation in the roll-out of the attached National Operating Policies and Procedures – Community Services in your Province.

Chancellor, the Honourable René Marin

National CEO, Interim Terry Wardrop



# NATIONAL OPERATING POLICIES AND PROCEDURES



**St. John Ambulance**

**SAVING LIVES**  
at work, home and play

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# National Operating Policies and Procedures —Community Services—

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## **Introduction**

This new document entitled “National Operating Policies and Procedures – Community Services” (NOPP-CS) is a refreshing, user-friendly, and volunteer-focused manual. It has been developed to replace a number of former policies and procedures including the St. John Canada Instructions—Part 2 (Volunteers) which functioned as the policy and procedure manual for Community Services (formerly known as “The Brigade”)

NOPP-CS contains those policies and procedures which are universal across all Community Services activities. Program-specific operational policies and procedures are expanded upon in the relevant program manuals (e.g. Medical First Response Services manual, Therapy Dog Program manual, etc.).

### **How NOPP-CS is Organized**

To begin, the section on Organizational Structure gives an overview of the current structure of St. John Ambulance (SJA). Policies and procedures have been divided into the following categories:

- Administrative
- Human Resource
- Programs and Services

This Introduction section also provides you with the policy template used to revise all of our existing policies and procedures.

Program specific content and standards (first response services, youth, therapy dog, etc.) are further defined in detail in stand-alone companion documents that address each program’s own unique areas of expertise. Also included in NOPP-CS are areas of commonality that cross all spectrums and stakeholders within the organization (human resources, risk management, etc.). NOPP-CS is therefore a series of documents that must be read within the context of the service area to which a volunteer is associated.

Throughout NOPP-CS, you will see a clear and well-defined distinction between policy and procedure. In other words, NOPP-CS clearly articulates what has been agreed to as national standards (policies - which cannot be altered unless as a result of national review) and what are implementation issues (procedures) that are designed for maximum flexibility within the different organizational jurisdictions across Canada.

Because policies and procedures are clearly defined as operational issues, and in order to better maintain NOPP-CS as an up-to-date and living document, responsibility for its content rests with the NMT (as do all organizational operational issues). In an effort to better articulate the roles of employees and volunteers in our common desire to serve our communities, NOPP-CS provides direction on areas of these specific responsibilities and accountabilities.

An Orientation Guide that Councils can customize is found in the Appendix of this manual.

Finally, creating this new manual was a challenging task and the following working group members made up of both senior staff and senior volunteers of the rewrite team deserve mention:

William Alexander, National Emergency Response Coordinator  
Brian Cole, Director Community Services-Ontario Council  
Kimberley Ghosh, Manager, Special Projects and Policy Development  
Barbara Graham, Past Provincial Commissioner-Ontario Council  
Les Johnson, Director-Client Services-National Office  
Don Lapierre, Director-Community Services–National Office  
Joanna Mulvihill, (administrative support)-Community Services–National Office  
and  
Glenda Janes, Executive Director, Newfoundland and Labrador Council (in the initial stages of work on these policies)

Some of the changes found in NOPP-CS are philosophical in nature and many are practical. All are designed, however, to improve the services we provide to our communities, to provide an improved and modern organizational image, and to protect the health, safety, and overall well-being of our most valuable assets – those that we serve, and those that serve for us.

Please let us know what you think of our new NOPP—CS. We look forward to your comments and suggestions. You are invited to communicate with the National Director of Community Services through your Provincial/Territorial Council Office.

A handwritten signature in black ink, appearing to read 'Les Chipperfield', written in a cursive style.

Les Chipperfield  
Vice-Chancellor, Community Service



# SJA Policy Template

**Policy Objective** (see definition below)

**Policy Statement** (see definition below)

**Effective date:**

**Applies to:** [E.g. All volunteers, instructors and employees affiliated with St. John Ambulance in any capacity herein after referred to as “individuals”]

## **Policy Objective (within policy box)**

*This states the purpose of the policy. It should be a brief statement. Using the example of the Employees and Volunteer Screening Cycle, the Objective would read:*

The purpose of this policy is to ensure the safety, quality of service and experience for our volunteers and members of the community by screening those who provide St. John Ambulance programs and services.

## **Policy Statement (within policy box)**

*A clear policy statement establishes SJA’s position and commitment on issues. The policy statement should be clear and concise. It should not include the details, requirements, subtleties, exceptions or procedures. It may include the expected outcomes or results. Here is an example using the Screening Cycle Policy:*

It is the policy of St. John Ambulance to:

- screen all volunteers, instructors, and employees as a condition of their association with St. John Ambulance;
- conduct annual performance assessments for all volunteers, instructors, and employees as part of an ongoing screening process.

## **Policy Context**

*This section can provide a summary of the context or need for the policy. This would include such things as a rationale or guiding principles for a policy. However, this section should be kept brief and concise, no more than a few paragraphs.*

## **Definitions**

*This section allows for inclusion of definitions of any terms used within the policy that may require clarification.*

## **Policy Requirements**

*This section allows for the details and requirements related to the policy to be presented. Distinct from procedures, policy requirements identify the conditions and (administrative) processes that must be in place to implement and enforce the policy. Typically, SJA policies have a number of requirements.*

## **Responsibilities/Accountabilities**

*This section should outline the responsibilities/accountabilities of National, Provincial, Council officials with respect to this policy.*

## **Procedures**

*Procedures provide instructions on how to implement the policy. Some policies will have lengthy procedures and accompanying tools (e.g. forms) that require the development and use of procedure manuals. Where a manual exists, this section will refer readers to the procedure manual for complete instructions.*

*Where the procedures are not extensive enough to require a manual, and do not exist in any other format, they can be included in total here.*

## **Resources**

*This section will identify any resources listed within the policy that may have to be referenced and updated when revisions are made to the policy.*

## **Policy Review**

*This section will identify how often the policy should/will be reviewed and indicate who is responsible for the review.*

## **Appendices**

*This section allows for attachment of any appendix that is considered part of the policy. An appendix would normally be used in situations where the detailed procedures are too detailed and lengthy to remain in the “Procedures” section of the policy document or where it is beneficial to have a “stand alone” addendum to the policy.*

## NATIONAL OPERATING POLICIES AND PROCEDURES

Policy	Volunteers	Employees	Instructors
Sec. D A-1 Cost Recovery for Delivery Services		√	
Sec. D A-2 Information Technology Services/use	√	√	√
Sec. D A-3 Volunteer Insurance Coverage	√		
Sec. D A-4 Uniform	√		
Sec. D A-5 Visual Identity	√	√	√
Sec. D A-6 Records Management	√	√	√
Sec. E HR-1 Conflict of Interest	√	√	√
Sec. E HR-2 Discipline	√		
Sec. E HR-3 Harassment & Discrimination	√	√	√
Sec. E HR-4 Privacy	√	√	√
Sec. E HR-5 Screening Cycle	√	√	√
Sec. F P-1 Medical First Response Services	√	√	√
Sec. F P-2 Therapy Dog Services	√	√	√
Sec. F P-3 Youth Program	√	√	√



# **Section A.**

## **Organizational Structure**





## **St. John Ambulance Services**

The Order of St. John maintains two foundations: the St. John Ophthalmic Hospital in Jerusalem, and St. John Ambulance. The mission of St. John Ambulance in Canada is *to enable Canadians to improve their health, safety and quality of life by providing training and community service.*

### ***St. John Ambulance Training Services***

St. John Ambulance Training Services is a network of health professionals and program development specialists who develop and deliver first aid and health promotion training and products (e.g. first aid courses). This training is delivered to hundreds of thousands of Canadians each year.

St. John Ambulance Training Services is responsible for setting the standards for all first aid and health promotion courses within St. John Ambulance (including Community Services-related courses). Setting national standards ensures that program content, protocols, and instruction are consistent.

### ***St. John Ambulance Community Services***

St. John Ambulance Community Services is responsible for delivering reliable and sustainable community services in accordance with the organization's mission and business plan. These services are provided by trained individuals who recognize and respond to community-based health and safety needs. The nationally recognized core community service programs include:

- Emergency Response Services
- Medical First Response Services
- Therapy Dog Services
- Youth Services

A number of variations and extensions of these core programs have been developed and approved based on provincial/territorial needs and include, but are not limited to:

- ski patrols,
- volunteer ambulance services,
- bike patrols,
- search and rescue,
- patient care and visitation services in hospitals and extended care facilities,
- campus response teams, and
- child safety programs.



### **Development of Community Service programs**

Regardless of whether a program is initially developed by a Council or by the National Office, the same criteria apply and certain standards have to be met. The standards ensure that there is a direct link to the SJA mission and mandate; that a business plan has been developed, presented and approved; that community needs have been assessed; that the programs are of the highest quality; that program training and delivery are consistent; that evaluations and monitoring are part of every program; and that the public receives the service they have come to expect from St. John Ambulance.

St. John Ambulance has gained the respect and recognition of the Canadian public, and the use of the name and logo lend credibility and validity to any program or service offered to the public. Because of this, every program using the St. John Ambulance name or logo must be legitimized by following the outlined procedure below:

- Any new or enhanced Community Services program used must be registered with the applicable Provincial/Territorial Council Office in a business plan format.
- New or enhanced Community Services programs being adopted must be approved through the Provincial/Territorial process set up for this purpose.
- All new programs developed must be reviewed by a privacy officer at the Council level to ensure compliance with the SJA Privacy Policy.
- Before any new or enhanced Community Services program can be endorsed nationally, it must be reviewed by the appropriate subject matter expert who sits on the Professional Standards and Accreditation Committee (PSAC) of Priory Council. It must also be presented to National Office (via the Director, Community Services) in order to be assessed against the organization's national insurance coverage.
- To be considered national, a Community Services program must be adopted by greater than fifty percent of Councils.

### **Registration procedure for a new or enhanced Community Services program**

A solid business plan in the form of program standards must be submitted in writing to the applicable Provincial/Territorial Council, with the following supporting documents:

- needs assessment (to assist with this process, a comprehensive reference guide titled "*Assessing and Meeting the Needs of your Community*" is available from your Provincial/Territorial Council);
- program goals and objectives;
- target group;
- program content and standards;
- expected outcomes (benefits and risks);





- financial plan, including anticipated support;
- training and resources requirements; and,
- assessment criteria and evaluation process.

### **National Governance**

Priory Chapter is the governing body of St. John Ambulance in Canada and represents the membership across the country. Priory Chapter derives its authority from the Prior of the Order—the Governor General of Canada—and from the Royal Charters, Statutes and Regulations of the Order and By-Laws and Priory Rules.

Priory Council is the executive arm of Priory Chapter and derives its authority from the Prior of the Order. Priory Council, as a “board”, is concerned with governance policy issues, and is invested with the power to authorize action in the name of Priory Chapter.

The Priory Chapter and Priory Council depend on the work of several standing committees to develop policy governance recommendations for approval and adoption by Priory Council.

The Professional Standards and Accreditation Committee (PSAC) was created in order to position SJA as a dynamic, market-driven organization which lives up to modern standards of care. PSAC functions as an advisory body to the Vice Chancellor, Community Services. This group of advisors focuses on quality assurance as well as policy and program review for training, products, and community service programs.

The chart on the last page of this section outlines the national structure and organizational levels of St. John Ambulance.

### **Provincial/Territorial Governance**

St. John Ambulance’s provincial/territorial structure is based on jurisdictional need, best practice and the scope of service delivery.

It is important to recognize that within all St. John Ambulance programs, the overall responsibility and accountability for Community Services programs remains with employees on behalf of their Council Boards.



### **Responsibility/Accountability**

The following is a list of requirements of operational responsibility and accountability for *Provincial/Territorial Offices* when it comes to day-to-day operations of Community Services programs (not all of these will be applicable in all Provincial/Territorial Councils):

- **Financial management** – Provincial/Territorial Offices will ensure that any expenditure other than allowable purchases from petty cash funds is pre-authorized. Employees will work in conjunction with volunteer members to establish annual budgets, and are responsible for ensuring that all donations (individual, in-kind donations from clients, etc.) are recorded and that a system for appropriate disbursement is enforced.
- **Client relationships** – Provincial/Territorial Offices are responsible for maintaining client contacts, assuring client satisfaction, and negotiating contracts and donations.
- **Member advocacy** – Provincial/Territorial Offices will ensure members' rights and responsibilities are clear and respected.
- **Planning** – Provincial/Territorial Offices will ensure that community needs assessments are completed and program audits are completed regularly.
- **Policy and Compliance** – Provincial/Territorial Offices will ensure that all organizational policies are adhered to (e.g. screening, volunteer job design, harassment, privacy, etc.).
- **Records management** – Provincial/Territorial Offices will ensure that all records, files and documents are maintained in a secure, confidential environment and available retention and disposal schedules are adhered to.
- **Risk management** – Provincial/Territorial Offices will ensure risk management assessment tools are adopted to determine levels of risk to which SJA members and the community are exposed.
- **Outcome measures** – Provincial/Territorial Offices will ensure that standards and measures for all programs and services are adopted to determine efficacy and return on investment.

The reputation and integrity of St. John Ambulance with our volunteers, donors, and stakeholders is built on efficient leadership and appropriate use of funds. The accountability lines identified above will increase the community's confidence in the fact that St. John Ambulance is looking after the best interests of all involved.



## **Organizational Levels**

### ***Community Service Units***

A Community Service Unit refers to a group of Community Services members at any level, and within any service-related category (e.g. Medical First Responders). The different unit classifications (e.g. local, Regional, Provincial/Territorial) are defined based on provincial/territorial need and approval.

While there is no specific minimum number of members or coordinators (leaders) required for the formation of a local Community Service Unit, the Unit must consist of sufficient numbers to be able to effectively provide community service, and to provide or access appropriate volunteer and service-related training, administrative support, and service-related resources.

The formation of a local Community Service Unit must be supported by the Provincial/Territorial Council (or geographic subdivision e.g. local Branch where one exists) based on jurisdictional need. The formation of a local Community Service Unit must be approved by the Provincial/Territorial Council.

### ***Geographic Subdivisions***

Provincial/Territorial Councils may, based on jurisdictional need, establish geographic subdivisions (e.g. regions, areas, branches) of a province/territory to assist with the administrative and operational delivery of all or part of St. John Ambulance's programs and services. Forming and designating such geographic subdivisions is dependent on function and need, and must be authorized by the Provincial/Territorial Council.

### ***Provincial/Territorial Offices***

Provincial/Territorial Offices are responsible to their Council Boards for efficient and effective operation of St. John provincially/territorially.

### ***National Office***

The National Office is responsible to the Priory for the efficient and effective operation of the National Office and support to Provincial/Territorial Councils as well as the Priory committee system.

## **Membership and Leadership Appointments and Designations**

Based on jurisdictional need, the Provincial/Territorial Council determines membership and leadership appointments, designations and related scope, numbers, and length of terms within its local St. John Ambulance organizational structure.



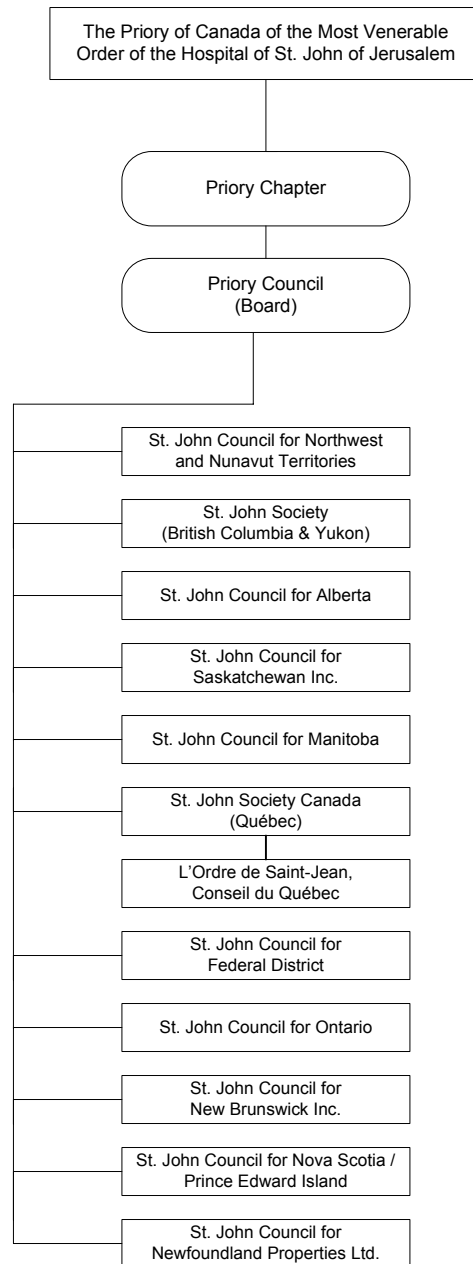
While designating rank has been a tradition within St. John Ambulance Community Services, it is at the discretion of the Provincial/Territorial Council as to whether rank designation or other means of identifying members and leaders may be added or substituted, provided that consistency is maintained on a provincial/territorial basis.

### **Community Services Structure**

The structure and related titles and positions of Community Services vary from Council to Council. It is recognized that this is necessary to accommodate the different needs within each geographical area and it is not within the purview of the National Office to prescribe how individual Community Services should be structured. The most important consideration is that the structure allows for the most efficient and effective delivery of service to our clients while mitigating risk and adhering to all national policies.



## 2006 St. John Ambulance Organizational Chart





## **Section B.**

### **Volunteer Rights and Responsibilities**

- St. John Ambulance Code of Conduct
- St. John Ambulance Commitment to Volunteers
- Your Volunteer Commitment to Volunteers







## **CODE OF CONDUCT FOR COMMUNITY SERVICES**

St. John Ambulance (SJA) recognizes the principle of mutual respect for the rights, responsibilities, dignity, and well-being of its volunteers, instructors, and employees.

This Code of Conduct defines the conduct expected of volunteers, instructors, and employees and applies to conduct that occurs when volunteers, instructors, and employees

- a) participate in SJA services, programs, or environments, or,
- b) act or claim to act as designated representatives of SJA.

All SJA volunteers, instructors, and employees will:

- adhere to all applicable human resource, operational/administrative, and program policies and procedures;
- act with honesty and integrity;
- display behaviour that brings credit to the organization;
- advise their supervisor(s) concerning any taken, or contemplated, actions or decisions that they know to be illegal, unethical, or not in the best interest of the organization;
- foster open and honest interaction amongst volunteers, instructors, employees, and clients in an environment free of discrimination, harassment, and abuse;
- promote a healthy and safe organizational environment;
- fulfill their role and responsibilities as stated in their position description;
- only undertake duties and responsibilities for which they have the required qualifications;
- endeavour to improve the quality of services and products provided by the organization;
- support organizational heritage conservation and preservation;
- maintain a high level of confidentiality with regard to personal information and intellectual property.

### **St. John Ambulance Commitment to Volunteers**

SJA will do the very best to ensure that your volunteer experience is both productive and rewarding. SJA in Canada is committed to:

- providing adequate information, training, and assistance to enable volunteers to meet the responsibilities of their positions;



- ensuring diligent supervisory assistance to volunteers by providing feedback through regular performance appraisals;
- providing personal injury, illness, and liability insurance for all members (contact your local St. John office for specific information);
- respecting the skills, dignity, and individual needs of each volunteer, and doing its best to adjust to the volunteer's individual needs;
- being receptive to volunteers' comments regarding ways in which we might better accomplish our respective tasks;
- accepting a volunteer's wishes not to fulfill any volunteer assignment that he or she believes to be inappropriate, unsafe, or unacceptable;
- treating volunteers as equal partners with the employees who, with the volunteers, are responsible for accomplishing our mission statement.

### **Your Volunteer Commitment to St. John Ambulance Canada**

As a volunteer with SJA, the organization has certain expectations of you. To serve as a SJA volunteer, you are expected to commit to the following:

- to perform your volunteer services to the best of your ability;
- to meet time and service commitments or to provide adequate notice so that alternate arrangements can be made;
- to adhere to SJA policies and procedures, including record keeping requirements and confidentiality of organization and client information;
- to accept supervision, to abide by the limits of your volunteer position description, and to seek help from the organization in a timely manner with any problems that might arise while you are volunteering;
- to accept that becoming a SJA volunteer is not automatic, and that the organization has the right to release you from your volunteer duties at any time that it believes that doing so is in the best interest of SJA, its clients or its mission;
- to attend whatever training the organization provides, either internally or externally, that is deemed necessary for you to perform your services to the best of your abilities;
- to act at all times as a conscientious member of the team responsible for accomplishing the mission statement of SJA in Canada.

## **Section C.**

### **Volunteer Recognition**

- The Order and Priory Awards
- Grand Prior's Award Program and Levels of Distinction
- Volunteer Service Awards
- Voluntary Community Services Certificates
- Special Service Shield
- Link Badge Program
- Council and Local Awards





## VOLUNTEER RECOGNITION

All SJA members are recognized for their valued contribution to the organization and to their communities. SJA recognizes the outstanding community service of our volunteers by presenting national, provincial, or local honours and awards at various times throughout the year. For details on the honours and awards available to you, please contact your local and/or Provincial/Territorial Office.

### **The Order and Priory Awards**

As a result of their service performed in support of the Order, volunteers may be recommended for Order or Priory Awards. Check with your Provincial/Territorial SJA Office for details.

### **Grand Prior's Award Program**

1. The Grand Prior's Award program exists as a way to motivate youth and young adults in SJA to develop a broad range of skills, and to encourage youth and young adults to achieve proficiency in a number of subjects. It is designed to occupy the interest of youth and young adults over a number of years, and to help develop individual competence and confidence.
2. SJA volunteers age 11-21 years of age in Youth or Adult Units may obtain Proficiency Certificates by qualifying in any of the subjects. No more than four Proficiency Certificates may be awarded in any calendar year.
3. When the individual has successfully completed twelve proficiency subjects, the Provincial/Territorial SJA Office will apply for the award of the Grand Prior's Award.

### **Grand Prior's Award - Levels of Distinction**

1. The Grand Prior's Award - Levels of Distinction are designed to encourage youth and young adults age 11-21 years of age in SJA who complete twelve Proficiency Subjects and earn the Grand Prior's Award to continue working on more Proficiency Subjects. It is an enhancement that leads to three badges for each level of distinction:

<i>Level of Distinction</i>	<i>Upon completion of</i>
Bronze	18th proficiency subject
Silver	24th proficiency subject
Gold	30th proficiency subject

2. Proficiency Subject principles, procedures and criteria are listed in the Proficiency Program Manual.



### Volunteer Service Awards

1. *Qualifying Service* — in order to qualify for volunteer service awards, volunteers must provide at least sixty (60) hours annually of direct (giving) volunteer service on behalf of SJA to the community, SJA or it's membership. Examples include, but are not limited to:
  - providing direct volunteer first aid services at public events if you are a volunteer SJA Medical First Responder;
  - providing direct volunteer therapy dog services at hospitals, long-term care facilities, etc. if you are a volunteer SJA Therapy Dog member,
  - providing volunteer clerical, administrative or leadership services if your assigned SJA role is to provide clerical, administrative or leadership services e.g. Volunteer Administrative Assistant, Unit Supervisor, Committee Chair, etc.,
  - providing volunteer support services if your assigned SJA role is to provide support services e.g. volunteer fundraising, equipment maintenance, etc.,
  - providing SJA-related volunteer instruction or training to others, if your assigned SJA role is to provide such volunteer instruction or training,
  - providing direct volunteer service within the community if you are a Youth Program participant.

***For specific information on awards that recognize all SJA volunteer activity (hours), please refer to the "Special Service Shield" and "Voluntary Community Services Certificates" sections.***

2. A *Service Stripe* is given to Adult and Youth members for each completed three years of qualifying service. The award is one bar for three years, two bars for six years, and three bars for nine years.
3. The *Service Medal of the Order* will be awarded to volunteers who have completed twelve years of qualifying service.
4. *Silver and Gilt Bars to the Service Medal* are awarded for each successive five years of qualifying service. The Service Medal, Bars, medal ribbon, and crosses are worn as follows for years of eligible service:

12 years	Service Medal, Ribbon
17 years	Service Medal and 1 Silver Bar, Ribbon and 1 Silver Cross
22 years	Service Medal and 2 Silver Bars, Ribbon and 2 Silver Crosses
27 years	Service Medal and 3 Silver Bars, Ribbon and 3 Silver Crosses
32 years	Service Medal and 1 Gilt Bar, Ribbon and 1 Gilt Cross

For every 5 years additional service, add 1 Gilt Bar and 1 Gilt Cross.



5. Qualifying service by Youth program participants as defined above qualifies for service to the Service Medal of the Order.

### **Voluntary Community Services Certificates**

Voluntary Community Services (Hours) Certificates recognize the accumulation of specific hour milestones of volunteer activity that a member 16 years of age and older achieves. Volunteer activity hours include:

- volunteer hours for providing direct “qualifying service” on behalf of SJA to the community, SJA, or its membership;
- volunteer hours for attending SJA-related training or meetings, etc.

*For specific information on “Qualifying Service” for Volunteer Service Awards, please refer to the section on “Volunteer Service Awards”.*

### **Special Service Shield**

1. The Special Service Shield (Hours) Badge recognizes the accumulation of specific hour milestones of volunteer activity that a Youth Program participant (age 11 to 15 years of age) achieves. Volunteer activity hours include:
  - volunteer hours for providing direct "qualifying service" on behalf of SJA to the community, SJA, or it's membership;
  - volunteer hours for attending SJA-related training or meetings, etc.
2. Youth Program participants who have completed a minimum of 200 volunteer activity hours will be awarded a red Special Service Shield Badge. On completion of each additional 200 hours of volunteer activity within SJA, a Special Service Shield Badge will be awarded as follows:
  - 400 hours green, printed with the number 400
  - 600 hours blue, printed with the number 600
  - 800 hours bronze, printed with the number 800
  - 1000 hours silver, printed with the number 1000
  - 1200 hours gold, printed with the number 1200
3. The Special Service Shield Badge may not be worn by members 16 years of age or older.

*For specific information on "Qualifying Service" for Volunteer Service Awards, please refer to the section on "Volunteer Service Awards".*



**Link Badge Program**

1. The Link Badge Program is to recognize the service and continuity of youth members from one program to another. There are three link badges: Link One recognizes membership completed in the Junior Program, Link Two in the Cadet Program, and Link Three in the Crusader Program.
2. To be eligible for a link badge, a member must have a minimum of one year of qualifying service in the corresponding portion of the Youth Program. It is not necessary for a member to take part in all portions of the youth program to qualify (e.g. someone joining SJA as an adult, who at one time spent a minimum of one year as a junior, is eligible to receive the Link One badge). Any currently active member is eligible to apply for receipt of a link badge(s).

**Council and Local Awards**

Local Branches, Units, and Provincial/Territorial Councils are encouraged to develop additional awards for Council and local levels, in order to promote excellence of service and retention of members.

For more information on volunteer recognition, contact your Provincial/Territorial SJA Office.



## **Section D.**

### **Administrative Policies**

- Cost Recovery for Delivering Services
- Information Technology Services/Use
- Volunteer Insurance Coverage
- Uniform
- Visual Identity (including trademark, image and identity)
- Records Management





## COST RECOVERY FOR DELIVERING SERVICES POLICY

<b>Policy Objective</b>	This policy is to ensure St. John Ambulance's future capacity to provide community services.
<b>Policy Statement</b>	It is the policy of St. John Ambulance to recover costs, where appropriate, for the delivery of community services.
<b>Effective Date</b>	April 2006
<b>Applies To</b>	Any St. John Ambulance Provincial/Territorial employee negotiating contractual agreements with Community Services clients.

### **Policy Context**

St. John Ambulance (SJA) has an obligation to recover the costs associated with the delivery of community services in order to remain competitive and ensure its future capacity.

### **Policy Requirements**

Cost recovery for community services should cover SJA's operational expenses for delivering such services.

### **Responsibilities/Accountabilities**

The National Office is responsible for:

- development and review of organizational policy
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Offices.

Provincial/Territorial Offices are responsible for:

- development and implementation of procedures for this policy
- development and regular review of a structured pricing model
- policy implementation
- compliance review of policy and procedures
- acting in an advisory and support role for local SJA offices and units.



Local SJA Offices and Units are responsible for:

- administering the procedures, including the establishment of contractual agreements with Community Services clients; and,
- fiscal management of recovered monies
- policy implementation
- compliance review of policy and procedures
- development and implementation of applicable procedures as identified by Provincial/Territorial Office

### **Procedures**

For information on cost recovery-related procedures, contact your local and/or Provincial/Territorial Office.

### **Policy Review**

This policy will be reviewed at a minimum of every three years and as required.

## INFORMATION TECHNOLOGY SERVICES/USE POLICY

<b>Policy Objective</b>	The purpose of this policy is to establish guidelines and minimum requirements governing the acceptable use of St. John Ambulance's information technology (IT) resources, including use of the Internet and Intranet, electronic mail, and information management resources.
<b>Policy Statement</b>	It is the policy of St. John Ambulance that all use of St. John Ambulance IT services shall: <ul style="list-style-type: none"><li>• respect and uphold jurisdictional legislation with respect to use;</li><li>• comply with St. John Ambulance's stated policies, procedures and standards;</li><li>• be courteous and follow accepted standards of etiquette;</li><li>• protect others' privacy and confidentiality in accordance with St. John Ambulance's Privacy Policy;</li><li>• reflect responsible use of St. John Ambulance IT services; and,</li><li>• use St. John Ambulance IT services for the purpose of carrying out the activities of St. John Ambulance.</li></ul>
<b>Effective Date</b>	April 2006
<b>Applies To</b>	All volunteers, instructors and employees affiliated with St. John Ambulance

### Policy Context

St. John Ambulance (SJA) IT services should be dedicated to approved activities and governed by rules of conduct similar to those applicable to the use of other SJA resources. The use of IT services imposes certain responsibilities and obligations on all users and is subject to SJA's policies and procedures and jurisdictional legislation. Use of SJA IT services is a privilege and must be used for the purpose of carrying out the objectives of SJA.

### Definitions

*SJA IT Services* – SJA provides to all active members within the Councils and Branches with email accounts (<http://mysja.sja.ca>), intranet accounts (<http://intranet.sja.ca>), and website tools (<http://www.sja.ca>).

*Web Services* – A content management system for the SJA website is available for use by all Councils, and their respective Branches to meet the compliance requirements of the SJA brand.



## **Policy Requirements**

1. Auditing the use of SJA's IT resources—SJA reserves the right to view or scan any file, email or software stored on SJA's systems or transmitted over SJA's networks and may do so periodically to verify that IT use conforms to the guidelines established in the policy statement.

Potential violations of SJA policy that are noted during these and other activities may be acted upon (in accordance with SJA's Privacy Policy, Harassment and Discrimination Policy and Discipline Policy).

2. IT security requirements:

SJA IT Services are a privilege provided to members for the purpose of carrying out the activities of SJA. In this regard, rights to access SJA IT services are only available to active members who comply with the SJA IT services Policy and Procedures as outlined herein.

As part of the SJA IT services, users must recognize that electronic correspondence is not inherently private, that messages could be misdirected by a user and that SJA takes no responsibility resulting from the disclosure of private communications occurring over SJA internet or email services.

Members who use SJA IT services are required to ensure that personal computers and/or workstations are safeguarded against viruses, malicious code attacks, unauthorized access resulting in theft, and the like by ensuring the respective computers and/or servers have the following minimal safeguards:

- have the latest software patches,
- disabled any unnecessary services,
- installed anti-virus software
- a username and pass code for access to the desktop.

Members who receive SJA IT services are required to comply with the Terms of Services Agreement (see attachment A of this policy). In general, the Terms of Services Agreement requires the following:

- 2.1 Users must not send email messages containing unusually sensitive information over the Internet without recognizing that electronic communications are not inherently private.



- 2.2 Users must not download or use the material, software or other intellectual property of others in violation of software licenses, copyright and trademark legislation; Users must not download or use on SJA systems any hardware or software not approved for use by SJA.
  - 2.3 IT use must be legal and ethical. Users may not use SJA IT services for any illegal activity or purpose such as knowingly disseminating SPAM, harassing, abusive, malicious, sexually explicit, threatening or illegal information, including jokes or cartoons (as per SJA's Harassment and Discrimination policy).
  - 2.4 Users must not disclose any passwords or security means and methods adopted by SJA.
3. Approvals— For services not within the scope of SJA IT services, members must receive approval from their Provincial/Territorial Office to ensure the protection of SJA's copyright and intellectual property.

### **Responsibilities/Accountabilities**

National Office is responsible for:

- development of general policy and procedures related to information technology
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Offices
- providing email, intranet and website services including the security of and issuing user IDs and pass codes for the purposes of delivering SJA services
- monitoring any and all electronic communications and use of the Internet to ensure the integrity of the system and compliance with this policy
- limiting use of SJA IT services as required
- protection of copyright including logo usage and intellectual property of SJA which includes approving and monitoring the use of the SJA brand in the development of SJA IT services

Provincial/Territorial Offices are responsible for:

- policy implementation
- compliance review of policy and procedures
- acting in an advisory and support role for local SJA offices and Units
- monitoring the use and content of SJA IT Resources such as local Web sites, chat rooms, electronic bulletin boards, email, etc.



- protection of copyright, logo usage an intellectual property of SJA which also includes approving and monitoring the use of the SJA brand in the development of local SJA IT services such as local Web sites, chat rooms, electronic bulletin boards, in some cases, email, etc.
- development of standards for corporate hardware procurement and use

Local SJA Offices and Units are responsible for:

- policy implementation
- compliance review of policy and procedures
- development and implementation of applicable procedures as identified by Provincial/Territorial Office
- monitoring the use and content of SJA IT resources such as local Web sites, chat rooms, electronic bulletin boards, email, etc.

## **Procedures**

### Email Account and Intranet Access

In some cases, Provincial/Territorial Councils provide their members and/or employees with a separate IT service which may or may not include email and intranet accounts, and web services. It is therefore requested that members first contact their Provincial/Territorial Office for information regarding these services.

- To set up additional services members require the approval of Provincial/Territorial Councils. These services may include local internet sites, chat rooms, electronic bulleting boards, email, etc.

National Office provides all members with IT services which include email accounts and intranet accounts:

- to receive an SJA email and/or intranet account, the respective individual must be an active member with SJA as identified within the national database system, UNITY.
- to request an email and/or intranet account, please send an email to [support@sj.ca](mailto:support@sj.ca) and an email and intranet account will be set up for you provided you meet the requirements in UNITY.
- to request and receive access to an email and/or intranet account, there is implied consent to the Terms of Service provided to new users and available on the SJA Intranet.
- should members have issues regarding the intranet or email account usage, please contact [support@sj.ca](mailto:support@sj.ca).





- should members have issues regarding web services, please contact [websupport@sja.ca](mailto:websupport@sja.ca).

Each person who requests an email account will automatically be provided with an intranet account.

#### *Termination of Services*

IT Support services must be notified if any user rights and/or access to the SJA IT Services is terminated, regardless of reason. Email notification that includes the user's name and email address must be sent to [support@sja.ca](mailto:support@sja.ca) to remove this person from having access to SJA IT services.

#### *Web Services*

Access to web services is restricted to approved employees and/or volunteers. Authority for access to web services is provided by the respective Provincial/Territorial Council. Requests for access to web services must be provided to [websupport@sja.ca](mailto:websupport@sja.ca) by the respective Council. All users are required to have completed the following prior to receiving access:

- Privacy Policy sign off; and
- Website Content Editor Training, including the respective area of responsibility of the Content Editor, and/or,
- Website Content Editor and Website Administration Training for Master Editors

#### *Termination of Services*

Web Support services must be notified if any user rights and/or access to the SJA Web Services is terminated, regardless of reason. Email notification that includes the user's name and email address must be sent to [websupport@sja.ca](mailto:websupport@sja.ca) to remove this person from having access to SJA Web Services.

## **Guidelines**

The following guidelines will assist SJA IT service users to understand and implement this IT policy.

1. Terms of Service Agreement is included in Attachment A. The purpose of the agreement is to outline the available services provided to all SJA members, including the acceptable use, accounts passwords and security requirements, members rights and responsibilities. Prior to receipt of an email and/or user account, users should read the Terms of Service Agreement.
2. Violations to the Terms of Services reported to SJA will be dealt with in accordance with related policy and procedures.



**Resources**

Corporate Graphic Standards Manual

St. John Ambulance Privacy Policy

St. John Ambulance Human Resources Policy

St. John Ambulance Website Policy and Procedures Manual

**Policy Review**

This policy will be reviewed at a minimum every three years or as required.



**Attachment A**

**Terms of Service Agreement**

SJA provides its service to its members subject to the following Terms of Service (the Agreement). The Agreement may be updated by SJA from time to time. As a member, you shall be subject to any posted guidelines or rules applicable to SJA services. All such guidelines or rules are hereby incorporated by reference into the Agreement.

**Description of Service**

SJA provides users with access to SJA IT Services, including email, intranet, and web services (the "Service") for its members. Any new features that augment or enhance the current Service, including the release of new SJA services, shall be subject to these the Agreement. The Service is provided "as-is" and SJA assumes no responsibility for the timeliness, deletion, misdelivery or failure to store any user communications or personalization settings. The Service is developed either exclusively for SJA and/or is provided under license to and/or agreement to SJA, and SJA is subject to terms of use. The Services should only be used for the purpose of carrying out the work of St. John Ambulance.

**SJA Privacy Policy**

Registration Data and certain other information about you is subject to the SJA Privacy Policy. Services relating to email, intranet are administered and supported by a third party provider under contract with St. John Ambulance National Office. As per the SJA Privacy Policy, the service providers who have access to personal information in the delivery of these services are bound by a Confidentiality and Non-Disclosure Agreement.

**Account, Password and Security**

You are responsible for maintaining the confidentiality of the password and account, and are fully responsible for all activities that occur under your password or account. You agree to (a) immediately notify SJA of any unauthorized use of your password or account or any other breach of security, and (b) ensure that you exit from your account at the end of each session. You are responsible for ensuring that all items received for future use are stored in a retrievable location. Any accounts after 185 days of inactivity will be deleted. Any items that are 120 days or older will be deleted from the email account(s). SJA cannot and will not be liable for any loss or damage arising from your failure to comply with this section.



**Limitations on Technology Use**

You agree not to:

1. Transmit any content that is offensive, unlawful, threatening, abusive, harassing, pornographic, devious, defamatory, invasive of another's privacy, hateful, or racially, ethnically or otherwise objectionable;
2. Harm minors or elder persons in any way;
3. Falsely state or otherwise misrepresent your affiliation with a person or entity;
4. Forge headers or otherwise manipulate identifiers in order to disguise the origin of any content transmitted through the Service;
5. Transmit any content that you do not have a right to transmit under any law or under contractual or fiduciary relationships (such as inside information, proprietary and confidential information learned or disclosed as part of employment relationships or under nondisclosure agreements);
6. Transmit any content that infringes any patent, trademark, trade secret, copyright or other proprietary rights of any party including SJA logos, products and service names that are part of the trademarks of SJA, whether or not registered, without prior permission;
7. Transmit any unsolicited or unauthorized advertising, promotional materials, "junk mail," "spam," "chain letters," "pyramid schemes," or any other form of solicitation, except in those areas (such as shopping rooms) that are designated for such purpose;
8. Transmit any material that contains software viruses or any other computer code, files or programs designed to interrupt, destroy or limit the functionality of any computer software or hardware or telecommunications equipment;
9. Interfere with or disrupt the Service or servers or networks connected to the Service, or disobey any requirements, procedures, policies or regulations of networks connected to the Service;
10. Engage in deceptive marketing or advertising practices;
11. Collect or store personal data about other users or access the Services for the purpose of data mining or extracting content from the Services beyond your personal end use.



SJA does not pre-screen content, but has the right to refuse or move any content that violates the Service or is otherwise objectionable. You must evaluate, and bear all risks associated with, the use of any content, including any reliance on the accuracy, completeness, or usefulness of such content.

SJA may preserve content and may also disclose content to: (a) comply with legal process; (b) enforce the Agreement; or (c) protect the rights, property, or personal safety of SJA, its users and the public.

### **General Practices Regarding Use and Storage**

You acknowledge that SJA may establish general practices and limits concerning use of the Service. SJA will provide you with an email account with a standard maximum storage capacity of 10 MB.

You are responsible for maintaining your email account by (a) archiving or deleting old messages and (b) removing large attachments that may slow down the Service. SJA reserves the right to place limitations on the maximum number of days that email messages, message board postings or other uploaded Content will be retained by the Service. You further acknowledge that SJA reserves the right to change these general practices and limits at any time, in its sole discretion, with or without notice.

### **Limitation of Liability**

1. SJA may be required from time to time to modify or discontinue, temporarily or permanently, the service (or any part thereof) with or without notice. Reasons may include but are not limited to software updates, server updates, etc. .
2. All content, whether publicly posted or privately transmitted, are the sole responsibility of the person from which such content originated. Under no circumstances will SJA be liable in any way for any content, for any errors or omissions in any content, or for any loss or damage of any kind incurred as a result of the use of any content posted, emailed, or otherwise transmitted via the Service.

### **Termination**

Service is only available to active members of SJA. If at any time your status with SJA changes regardless of purpose or reason, all rights to the Services will be terminated.

SJA reserves the right, in its sole discretion, to terminate your password, account, or use of the Service, and remove and discard any content within the Service, for any reason, including for lack of use or if SJA believes that you have violated or acted inconsistently with the letter or spirit of the Agreement. As part of the Agreement, an account with 185 days of inactivity will be deleted and items over 120 days will be deleted from the email account.



Termination of your access to the Service under any provision of this agreement may be effected without prior notice, and you acknowledge and agree that SJA may immediately deactivate or delete your account and all related information and files in your account and/or bar any further access to such files or the Service. Further, you agree that SJA shall not be liable to you or any third-party for any termination of your access to the Service.

### **Violations**

Please report any violations of the Agreement to [support@sja.ca](mailto:support@sja.ca) or mail or fax to: St. John Ambulance National Office, 400-1900 City Park Drive, Ottawa, Ontario, K1J 1A3  
Tel: (613) 236-7461 or Fax: (613) 236-2425.



<b>Policy Objective</b>	The purpose of this policy is to ensure that appropriate insurance coverage is in place to protect those volunteers who provide nationally approved St. John Ambulance programs and services.
<b>Policy Statement</b>	It is the policy of St. John Ambulance to provide comprehensive national liability and accident insurance coverage for all its volunteers.
<b>Effective Date</b>	April 2006
<b>Applies To</b>	All volunteers affiliated with St. John Ambulance

### Policy Context

National insurance includes both a Commercial General Liability Policy and a Blanket Accident Insurance Policy. The national insurance policy provides liability insurance for all St. John Ambulance (SJA) volunteers while engaged in nationally approved SJA activities. This insurance covers volunteers for:

- a) liability imposed by law – bodily injury to third party or property damage to third party arising from premises, products or operations
- b) defence costs
- c) medical reimbursement (up to certain maximums)
- d) loss of hours of work (to a maximum limit per week)
- e) contraction of infectious diseases is covered if the disease is acquired from exposure while engaged by SJA (some restrictions apply).

### Policy Requirements

1. Medical First Response Services—The national insurance policy covers Medical First Responders in any instance in which first aid assistance is provided.
2. Professional Health Care Personnel—The national insurance policy covers professional health care personnel (i.e. medical doctors, nurses and emergency medical personnel) while they are volunteering for SJA. However, the national insurance policy does not include any Professional Malpractice protection. This means that no matter what other qualifications a person may have, they must rely on their professional or personal liability insurance if they choose to exceed the mandate of SJA community services while volunteering as a member of SJA.



3. Therapy Dog Program—All Therapy Dog Program Members (Handlers) are covered under SJA's liability and accident insurance. The dogs are covered under SJA's liability insurance in the event they cause injury or damage while providing service.

If the dog is injured while on duty or traveling to or from an event, the owner is wholly responsible.

4. Youth Program—All Youth Program participants and Youth Leaders are covered under SJA's liability and accident insurance. The national insurance policy includes coverage for all programs that are normally part of the SJA Youth Program (e.g. field trips, non-contact sports, camps).
5. Property—The national insurance policy does not provide coverage for property insurance. This is the responsibility of each local and/or Provincial/Territorial Office.
6. Automobile – The national insurance policy does not provide coverage for automobile insurance. This is the responsibility of each local and/or Provincial/Territorial Office.

### **Responsibilities/Accountabilities**

National Office is responsible for:

- development and implementation of procedures for this policy
- development of procedures for National Office Volunteers
- identifying a national insurance broker
- identifying a national, licensed insurance carrier and negotiating terms
- administering the plan through the carrier and broker
- addressing questions and concerns about SJA insurance coverage coming from Provincial/Territorial Offices
- gathering required statistical information (e.g. volunteer numbers)
- informing Provincial/Territorial Council offices of coverage details; and
- identifying potential claims to the insurance carrier
- collecting personal information of its members for the purpose of providing insurance coverage





Provincial/Territorial Council Offices are responsible for

- policy implementation
- compliance review of policy and procedures
- administering the National Office plan
- forwarding questions and concerns about SJA insurance coverage provided by volunteers
- providing required statistical information (e.g. volunteer numbers) to the National Office
- informing membership of coverage details
- identifying potential claims to National Office

Volunteer members are required to:

- ensure that their information is up to date and accurate
- to assist their Provincial/Territorial and National Office in providing accurate records of incidents related to any claims as per Provincial/Territorial procedures

### **Procedures**

For detailed information on standardized insurance-related procedures, contact your local and/or Provincial/Territorial Office.

### **Policy Review**

This policy will be reviewed at a minimum every three years and as required.





## UNIFORM POLICY

<b>Policy Objective</b>	The purpose of this policy is to establish general guidelines for volunteers who wear St. John Ambulance uniforms for delivering program-specific community services.
<b>Policy Statement</b>	It is the policy of St. John Ambulance that all Community Services volunteers are expected to wear an approved uniform for the Community Services program that they deliver.
<b>Effective Date</b>	April 2006
<b>Applies To</b>	All Community Services volunteers affiliated with St. John Ambulance

### Policy Context

All St. John Ambulance's (SJA) Community Services volunteers are entitled, and expected, to wear an approved uniform. While this uniform will differ depending upon the community service provided (e.g. Youth service, Medical First Response service, Therapy Dog service), commonality is achieved through the appropriate use of dress, insignia, and the SJA name and logo.

Nationally, provincially/territorially, and within local communities, the uniform publicly identifies each volunteer, and group of volunteers, as individuals who are trained to recognize and respond to specific community needs. Thus, the uniform provides the public with a sense of reassurance and allows trust to be placed upon those who wear it.

The uniform also readily identifies, both to the public and to those within the organization, volunteers who hold specific training or qualifications.

For the individual Community Services volunteer, the uniform provides a sense of identity, common purpose, belonging, and accomplishment.

### Policy Requirements

1. Where applicable, volunteers who represent SJA at community service activities must wear an approved SJA uniform.
2. Volunteers must ensure that their personal uniforms are well maintained and meet all guidelines for wearing the SJA uniform.



3. Volunteers 18 years of age and older must wear and display the nationally-approved identification badge issued by SJA at all Community Services activities.

For information on ID Badge design/pattern, please reference the *Corporate Graphics Standards Manual*.

### **Responsibilities/Accountabilities**

National Office is responsible for:

- approving Council-established uniform-related standards
- acting in an advisory and support role to Provincial/Territorial Offices on uniform-related matters; and,
- maintaining national insignia, decorations and badges for purchase and/or use by Councils.

Provincial/Territorial Offices are responsible for:

- development and implementation of procedures for this policy
- policy implementation
- compliance review of policy and procedures
- establishing uniform-related standards for use in Community Services programs; and,
- acting in an advisory and support role for local SJA offices and units with respect to uniform related standards, and procurement.

Local SJA Offices and Units are responsible for:

- acting in an advisory and support role for local SJA units
- policy implementation
- compliance review of policy and procedures
- development and implementation of applicable procedures as identified by Provincial/Territorial Office

### **Procedures**

For detailed information on standardized uniform procedures, contact your local and/or Provincial/Territorial Office.



## **Guidelines for Wearing the St. John Ambulance Uniform**

### *Who May Wear a St. John Ambulance Uniform?*

1. The following individuals are entitled to wear SJA Community Services uniform:
  - those individuals who are qualified and authorized to perform SJA Community Services activities.
2. Specific provincial/territorial standards may be implemented to outline:
  - which uniform parts the individual is responsible for supplying,
  - the conditions under which new uniforms or uniform parts may be issued (e.g. uniform life expectancy, budgetary issues, probationary periods, types of services performed, etc.),
  - the style of uniform to be issued to volunteers.

### *Formal Dress Uniform*

1. SJA has a visual identity that is based on the modern functions performed by its volunteers at various levels. Some remnants of the former Community Services identity may be retained for formal or ceremonial purposes where they are found to be useful and pertinent. Such formal dress should be consistent—regardless of the type of community service(s) provided—and the design/pattern must be approved by Provincial/Territorial Council in consultation with the National Office. The National Office and/or Provincial/Territorial Council may authorize retired uniformed Community Services members or other persons deemed appropriate to wear the formal dress uniform.
2. Occasions where it may be appropriate to wear the formal dress uniform include:
  - formal ceremonies, parades, functions
  - state ceremonies,
  - in attendance on, or as escort to, Royal and Vice-Regal personages,
  - religious services, church parades, funerals, weddings,
  - awards ceremonies or inspections,
  - investitures (Order of St. John or other recognized and approved Orders),
  - Remembrance Day services or ceremonies
  - levees,
  - as an SJA representative at a military function,
  - other occasions as directed.



*Working Dress Uniform*

1. The work uniform is worn by Community Services volunteers in the day-to-day provision of community services.
2. Provincial/Territorial Councils are responsible for clearly defining the standards in consultation with the National Office which outline the design and occasions for wear of the work uniform within their respective jurisdiction. Commonality of design and wear must be maintained on a provincial/territorial basis.
3. Specific work uniforms may be developed for each category of community service or, likewise, for specific needs within each category of community service.
4. When designing work uniform standards, considerations must include:
  - appropriateness in relation to the type of service and activities being undertaken;
  - public image and perception; and,
  - the safety, comfort and dignity of the individual volunteer.

*Uniform-related Safety*

1. For any SJA activity, personal safety must always be considered. Volunteers should wear suitable, high visibility garments, safety footwear, and protective clothing appropriate to the task they are undertaking as authorized by the Provincial/Territorial Council.

*Orders, Decorations, Insignia and Badges*

1. Authorized insignia of Orders, decorations, insignia and badges may be worn on those occasions when it is deemed appropriate and with the approval of the Unit Supervisor.
2. Only those insignia authorized by the Provincial/Territorial Council may be worn on the SJA uniform.
3. While designating rank has been a tradition within St. John Ambulance Community Services, it is at the discretion of the Provincial/Territorial Council as to whether rank designation or other means of identifying members and leaders may be added or substituted, provided that consistency is maintained on a provincial/territorial basis.

*Personal Appearance*

1. The deportment and appearance of all volunteers in uniform shall, on all occasions, reflect credit on the individual and on SJA.

2. Volunteers in uniform shall carry themselves in a manner which projects a positive appearance. Behaviour such as chewing gum, slouching, placing hands in pockets, and smoking in public are strongly discouraged.
3. Volunteers in uniform shall be well-groomed. This includes, but is not limited to, the following:
  - wearing clean, well fitting, unwrinkled uniforms,
  - displaying personal cleanliness and hygiene,
  - having hair neatly groomed and styled,
  - wearing a minimal amount of scented products, makeup, and jewellery.

## **References**

Corporate Graphics Standards Manual

## **Policy Review**

This policy will be reviewed at a minimum every three years and as required.







St. John Ambulance

## VISUAL IDENTITY POLICY

<b>Policy Objective</b>	The purpose of this policy is to help ensure the consistent use of the graphic elements of the St. John Ambulance corporate identity and to ensure that the St. John Ambulance trademarks are protected.
<b>Policy Statement</b>	It is the policy of St. John Ambulance to present a visually unified, clear image of the organization through the consistent use of its graphic elements.
<b>Effective Date</b>	TBA
<b>Applies To</b>	All volunteers, instructors and employees affiliated with St. John Ambulance

This policy is currently under development.

Please consult with your Council Marketing/Communications staff person and refer to SJCI 2-12-1 “Image and Identity”.

The existing St. John Ambulance (SJA) Corporate Graphics Standards manual should be used until such time as the new SJA Visual Identity Manual and Visual Identity Manual “Lite” are released in July 2006. Please contact your Council Marketing and Communications staff (or National Office) for guidance.





## RECORDS MANAGEMENT POLICY

<b>Policy Objective</b>	The Records Management Policy is intended to ensure the safeguarding and protection of all records, in both paper and electronic format, to comply with applicable legislation.
<b>Policy Statement</b>	It is the policy of St. John Ambulance to safeguard and protect all records stored on-site or offsite, or records accessible to third party providers regardless of the format.
<b>Effective Date</b>	April 2006
<b>Applies To</b>	All volunteers, instructors, and employees in all departments, at all locations and for all records within the control of St. John Ambulance.

### Policy Context

As part of the delivery of Community Services Programs and first aid training programs, St. John Ambulance (SJA) has within its control, records of various types and formats that relate directly to both personal information and corporate information.

### Definitions

*Active Record* – a record that is still in use. Active records are to be maintained on-site within an SJA office in its appropriate department.

*Archives* – Materials created or received by a person, family or organization, public or private, in the conduct of their affairs and preserved because of the enduring value contained in the information or as evidence of the functions and responsibilities of their creator.

*Artifacts* – A man-made physical object, an item of natural origin or an item that is a representative example of class. Artifacts may be preserved as records, documenting a design or function.

*Clients* – recipients of training courses, products and/or community service programs (paid or unpaid) and donors.

*Council* – St. John Ambulance operations within each province and/or territory is controlled by St. John Ambulance Provincial/Territorial Office (a separately incorporated charity) that is known as St. John Council for *Province/Territory e.g. St. John Council for Ontario*.



*Database* – a collection of data arranged for ease and speed of search and retrieval.

*Destroy* – to remove any trace of information through various means, including erasing, shredding, and the like.

*Destruction* – the deletion of records beyond reconstruction.

*Donor* - one who contributes, in-kind or monetarily, to St. John Ambulance.

*Electronic Records* – Records that are implemented on or controlled by a computer or computer network.

*Erase* – to remove from electronic storage systems information

*File* – A record containing a document or documents relating to a specific topic.

*Financial Records* – Records relating to the Finance Department. These records may include invoices, receipts, bank statements etc...

*Glean* – to review and pull unnecessary or duplication of information for shredding

*Historical records* – records that are retained on a permanent basis and include:

- constitution and by-laws,
- committee, Board of Directors and Annual General Meeting minutes,
- selective retention of building and site contracts, land titles, environmental studies on properties,
- records relating copyright or trademark applications,
- selective retention of financial audits for archival purposes,
- funds – bursaries and scholarships,
- records relating to legal issues, opinions and advice provided to the Board of Directors,
- selective retention of public relations records– newspaper clippings, media relations documents (e.g. press releases),
- risk management records and insurance records,
- donor records,
- member service records,
- community service volunteer admission and promotions in the Order of St. John, and
- commemorative medal recipients.



*Human Resources Records* – Records concerning personnel recruitment and management

*Indefinite Records* – Records that are to be kept for an undetermined amount of time.

*Inactive Record* – Records that are no longer referenced and can be considered closed. These files are to be stored in a secure location and destroyed based on SJA's retention Schedule.

*Jurisdiction* – refers to the St. John Ambulance Councils and their respective operating centres (branches), and any community service divisions, units, fellowships, instructors that may be within their respective.

*Legal Records* – Records pertaining to Legal documentation, transactions, opinions, findings, determinations etc.

*Members* – Members of the Order, Board Members, volunteers, instructors, and employees.

*Off-site Storage* – the storage of records, off of SJA property and usually by a third party provider.

*On-site Storage* – the storage of records on SJA property.

*Order of St. John* – The Most Venerable Order of the Hospital of St. John of Jerusalem (Order of St. John) is an international charitable humanitarian organization, active in Canada for more than 118 years. St. John Ambulance is one of two foundations of the Order of St. John.

*Personal information* – is any personal identifiable information that is not the name, title, business address or contact information of an employee of an organization. Personal information about an identifiable individual may be factual or subjective, recorded or not. Personal information refers to or includes:

- all personal information that is collected, used or disclosed within the control of St. John Ambulance as an organization operating across Canada
- information that is collected, used or disclosed by St. John Ambulance at all levels of the organization including National Office (federally incorporated charity) and Provincial/Territorial Councils (separately incorporated charities) and their respective Branch(s), Divisions and Unit levels.
- information provided by members (Members of the Most Venerable Order of the Hospital of St. John of Jerusalem (the "Order"), volunteers, instructors, employees) and clients.



- information in all formats including paper-based and electronic and in all locations.

*PIPEDA* – Personal Information Protection and Electronic Documents Act

*Principles of Provenance* – history of a document including author, approval bodies, etc.

*Priory Council* – Priory Council is the executive arm of Priory Chapter and derives its authority from the Prior of the Order. Priory Council, as a “board”, is concerned with governance policy issues, and is invested with the power to authorize action in the name of Priory Chapter.

*Record* – any form of recorded information, kept in both electronic and paper format including: any correspondence, memorandum, report, book, plan, map, drawing, diagram, pictorial or graphic work, photograph, documentary material, film, microform, sound recording, videotape, file or box containing any of the above.

*Retention Schedule* – a list of all record classes and the respective time periods for which they are kept and the required method of destruction.

*Shred* – to destroy

*Third Party Supplier* — a third party is a company or organization that has been contracted by St. John Ambulance to provide services. The third party provider may have direct access to personal information. Examples of third party providers may include Management of IT services, mailing house for the distribution of bulk mail, consultants required to develop and/or support a database containing personal information, and the like. However it does not include key internal business functions such as payroll administration.

## **Policy Requirements**

1. Records must be accurate and up to date.
2. Records are kept in a safe and secure location to protect against loss or theft.
3. Records must be retained for the time required to achieve the purpose for which they were collected.



4. Records must be protected against loss, theft and safeguarded from unauthorized access by implementing security safeguards appropriate to the sensitivity of the information regardless of the format in which it is held.
5. Records must be assigned to a record retention schedule, as per applicable federal and provincial legislation.

### **Responsibilities/Accountabilities**

National Office is responsible for:

- development of general policy and procedures related to records management
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Councils and Offices
- training new members
- implementation and monitoring of the Records Management programme

Provincial/Territorial Councils and Offices are responsible for:

- acting in an advisory and support role for local SJA offices and Units
- application of the general policy and procedures related to records management and related policies are required within their jurisdiction by law
- training new members
- implementation and monitoring of the Records Management programme

Local SJA Offices and Units are responsible for

- application of the general policy and procedures related to records management and related policy as provided by their Provincial/Territorial Council
- training new members
- implementation and monitoring of the Records Management programme

### **Procedures**

#### *Records Management*

In order to ensure that the information is maintained, accurate and up to date, each Council is required to develop an internal schedule to review their records management system. This includes a minimum annual review of records filing system, file locations and file contents to glean (remove duplicate information) and destroy (permanently remove).



*Hard Copy*

1. All records are to be maintained in a file with a title corresponding to the records in the file. The file codes for records are maintained by each Local SJA Offices and Council in a manner that is accessible and can be easily searched.
2. Records are to be safeguarded in a secure location.
3. A database of all records stored in hardcopy must be maintained and up to date for easy access and search ability.

*Electronic Records*

Policies relating to electronic records management such as the protection and storage of electronic records are located herein. For policies relating to Acceptable Use, Intranet, Email, Website and the like, refer to the Information Technology Services Policy.

1. Server Information
  - 1.1. All information located on the server is the property of, and under the control of, St. John Ambulance. All servers and computer stations must be password protected whereby passwords are updated on a quarterly basis.
  - 1.2. For easy accessibility and search requirements, all electronic records should be organized on the server in a logical manner (by year, and department and/or subject). Records must be reviewed on a yearly basis for consolidation and organization.
  - 1.3. Back-ups are performed on a regular basis by a designated individual, IT or external third party. Yearly back-ups are to be retained in a zip file in a secure location for seven years.
  - 1.4. Retention - Records are to be retained on-site in a permanent format (e.g. either DVD, CD or other retrievable means) for three years after which they are kept for an additional four years in storage (can be off-site).
2. Software Upgrades - All electronic records should be converted when there is a software upgrade. Quality check should be performed after conversion to ensure data has not been corrupted during the process. Date and format are to be indicated.
3. Recordings - Recordings for the purpose of collecting information for minutes may be done by cassette tape, digital voice recorders or computers. When recording meetings, all participants must be aware and permission must be received in advance of the meeting. This may be done annually or as new members join a Committee, Team and/or the like. Records of meetings are retained until minutes have been approved by the respectful committee at which time they are destroyed.





Other recordings for the purposes of marketing and communications must be saved electronically with the properties of the recording completed in full to include confirmation of permission to use as per the release form.

4. Digital Images and Photos - All digital images and photos should be approved and be able to provide proof of approval for use prior to uploading to a server, computer, website or to be used in marketing collateral materials, and the like.

A signed photo/image release and/or permission form should be stored in a secure location for future reference, as required.

It is recommended that images/photos saved in electronic format should include a summary in the properties section of the file (in Windows, select File and then select “Properties”, then select the tab entitled “Summary”).

For the purposes of storage and future use of photos / image, the file should be saved for print quality (high resolution or minimum 300 dpi) and/or web quality \*low resolution or between 72 dpi – 299 dpi).

5. E-mail

All information located on the server is the property of, and under the control of, St. John Ambulance. Subsequently an email account provided to a member of SJA is an electronic record and should be treated accordingly.

Emails should be reviewed and auto-archived on a monthly basis. The Archive folder should be kept in a secure location on the server and reviewed on a yearly basis.

Every 3 years archive folders shall be backed up on a zip drive and stored at a secure location.

#### *Archival and Historical Records*

Archival records should be stored in a safe and environmentally controlled location, and are permanent records for the purpose of protecting and preserving the organization’s history. Subject to the archival type, archival records are to be stored at a specific temperature and humidity level.

#### *UNITY*

Specific requirements to record management are included in Attachment B.



### *Security Access*

Based upon the personal and confidential information contained within a record, access to records will be restricted. The following security access level is to be applied to records: (see records retention schedule).

1. Security Level for Internal Use

The following is a classification of information according to its sensitivity and the related protection that is required:

Level 2 – Securely protected, locked cabinet, restricted access and access to designated personnel access

Level 1 – Securely protected, locked cabinet, limited personnel access

Level 0 – Contains no personal information, securely protected location

### *Onsite/Offsite Storage of Records*

Records must be stored in a records file with the following information.

1. Box number
2. Department
3. 'From' Date and 'To' Date
4. Major Description
5. Destruction Date, if applicable

### *Destruction Approval*

Destruction dates of all records must be monitored for compliance with national, federal and provincial laws. All records designated for destruction shall receive a request from the department head to confirm the date of destruction. A copy of the request, approving destruction, must be signed by the Department Director prior to issuing the directive to the assigned/designated individual responsible for monitoring and complying with the Records Management Policy. Confirmation of the destruction is required and may be shown by signature or certification of destruction, i.e. by a third party supplier.

## **Resources**

Changes to resources identified below may directly impact the procedures contained herein:

SJA Privacy Policy

Personal Information Protection & Electronic Documents Act (PIPEDA)

## **Policy Review**

The Records Management Policy should be reviewed every 3 years, and as required.

### Record Retention Schedule

Within the Privacy Policy, St. John Ambulance refers to areas where records are securely located: National Office (NO) and its provincial and territorial councils (CO) and their respective operating centres (branches)(BR). Hard Copy or Paper Records no longer valid are gleaned (the process of reviewing and extracting pertinent information) and destroyed (non-pertinent information). Soft Copy Records or Electronic Records are gleaned and moved to a secure electronic storage site.

#### Security Level for Internal Use:

Level 2 – Securely protected, locked cabinet, restricted access and access to designated personnel access

Level 1 – Securely protected, locked cabinet, limited personnel access

Level 0 – Contains no personal information, securely protected location

Record Description	Format	Area where records are held	Retention Schedule	Method of Disposal	Security Level
<b>Training Records</b> Registration Forms	Paper Electronically	NO, CO, BR NO, CO, BR	Glean/move 3 years	Destroy/Shred Erase	2
Instructor Applications / Instructor-Trainer Applications	Paper application Electronically	NO, CO, BR NO, CO, BR	Glean/move 3 years (post dep.)	Destroy/Shred Glean/Erase	2
Instructor agreements	Paper	CO, BR	Indefinitely	Glean/Shred	1
Instructor Monitoring Reports	Paper Electronically	NO, CO, BR	Glean/Move Glean/Move	Destroy/Shred Erase	2
Course Survey	Paper	CO, BR	Glean/Move	Glean/Shred	0
<b>Volunteer/Community Services Records</b>					
Applications	Paper	NO, CO, BR	Glean/move	Destroy/Shred	2
Police checks/ Attestation Forms	Electronically Paper	CO, BR NO, CO, BR	7 years (post dep.) 7 years (post dep.)	Glean/Erase Glean/Shred	2
Patient/care records	Paper	CO, BR	10 years	Glean/Shred	2
Volunteer Personal Information	Paper Electronically	NO, CO, BR NO, CO, BR	Glean/move Indefinitely	Destroy/Shred Glean/Shred	2
Performance records	Paper Electronically	CO, BR	7 years (post dep.) 7 years (post dep.)	Glean/Shred Glean/Erase	2

Record Description	Format	Area where records are held	Retention Schedule	Method of Disposal	Security Level
Grievance disputes	Paper	NO, CO, BR	7 years (post dep.)	Glean/Shred	2
	Electronically		7 years (post dep.)	Glean/Erase	
Member service records / Promotions in the Order	Paper	NO, CO, BR	Glean/move	Destroy/Shred	2
	Electronically	NO. CO, BR	Indefinitely	Glean/Erase	
Nominations Forms	Paper	NO, CO	2 years	Destroy/Shred	2
	Electronically		2 years	Erase	
<b>Awards</b>	Paper	NO, CO, BR	Glean/move	Destroy/Shred	1
	Electronically	NO. CO, BR	Indefinitely	Glean/Erase	
Bursary Applications (recipients)	Paper	NO, CO	10 years	Destroy/Shred	2
Bursary Applications (non-recipients)	Paper	NO, CO	2 years	Destroy/Shred	2
<b>Fundraising/ Donations</b>					
Receipts	Paper	NO, CO, BR	3 years	Destroy/Shred	1
Records of donations subject to direction by donor	Paper	NO, CO, BR	Indefinitely	Historical Record	1
Property	Paper	NO. CO, BR	Indefinitely	Historical Record	1
<b>Administration</b>					
Personnel Records	Paper	NO, CO, BR	7 years (post dep)	Glean/Shred	2
	Electronically	NO, CO, BR	7 years (post dep.)	Glean/Erase	
Payroll	Paper	NO, CO, BR	7 years	Glean/Shred	2
	Electronically	NO, CO, BR	7 years	Glean/Erase	
Source deduction forms	Paper	NO, CO, BR	7 years	Glean Shred	2
Time Sheets	Electronically	NO, CO, BR	7 years	Glean/Shred	1
	Paper	NO, CO, BR	7 years	Glean/Erase	
New/Change forms: Pension Group Insurance	Paper or Electronically	NO, CO, BR NO, CO, BR	7 years 7 years	Glean/Shred Glean/Erase	2
Board and Committee Meeting Minutes	Paper or Electronically	NO, CO, BR NO, CO, BR	7 years Indefinitely	Glean/Shred Historical	0

<b>Record Description</b>	<b>Format</b>	<b>Area where records are held</b>	<b>Retention Schedule</b>	<b>Method of Disposal</b>	<b>Security Level</b>
Constitution/ Bylaws	Paper	NO, CO	Indefinitely	Historical	0
Building/site contracts/titles/ environmental studies	Paper	NO, CO	Indefinitely	Historical	1
<b>Trademarks and copyright applications</b>	Paper	NO, CO	Indefinitely	Historical	1
Records relating to legal issues	Paper Electronic	NO, CO, BR	25 years	Glean/Shred Glean/Erase	2
<b>Financial</b> The General Ledger and other book of final entry containing the summaries of the year-to-year transactions and all Source Documents	Paper Electronically	NO, CO NO, CO	7 years 7 years	Glean/Shred Glean/Erase	1
<b>Audited Financial Statements</b>	Paper Electronic	NO, CO, BR NO, CO, BR	7 years 7 years	Glean/Shred Glean/Erase	0

Retention Schedule Sources: CCRA, HRDC, CPSO, CNO  
(Post. Dep.) refers to post departure.

For questions and/or changes concerning the Retention Schedule, please contact the CEO or Executive Director of your Provincial / Territorial Council. For questions regarding St. John Ambulance's Privacy Policy, email the [privacyofficer@sja.ca](mailto:privacyofficer@sja.ca) or contact the Privacy Officer for St. John Ambulance Provincial / Territorial Office in your jurisdiction.



## Records Management - UNITY

### Access

Only those users who have been approved and licensed by the Provincial/Territorial UNITY Team Lead will have access to UNITY.

### Visibility

Within UNITY, *visibility* refers to the limiting of the views or screens seen by users as well as the records seen by users.

#### *Access to UNITY Screens and Views:*

There is a first level security within UNITY that is based on each users individual roles and responsibilities. UNITY defines what roles see what screens and views and therefore your system might look different than your colleagues.

#### *Access to UNITY Data*

Another level of security is limiting access to UNITY data. Each user within the system is tagged to an Organizational Unit (Org Unit) ie. Council, Branch, Admin Centre. As well, each piece of UNITY data (Contact, Account) is also tagged to an Org Unit. In certain cases, UNITY will match the data to your Org Unit to determine whether you have rights to update the information. The following table outlines the security levels placed on each major module of the system along with a narrative describing the reason for the decisions.

#### *Legend for the Visibility Levels*

All	All employees across the country are granted this right.
Branch	All employees within a branch are granted the particular right. These rights also extend to parent Admin Centres or Councils of a branch who will always have at least the same rights of a branch.
Council	All Council employees will be provided the rights but not branch or admin centre employees.
National	All employees at National Office are granted the particular right.

(*)	Implies that a particular right extends only to those records that have been created by that user's organizational unit but not other records. For example, if an Update: All(*) implies that a user may only update records that they created and may not update records that another branch has created.
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**UNITY User Requirements**

- a) All users must be approved by the respective Council
- b) All users must be trained in the Privacy Policy.
- c) All default passwords provided to users should be changed.
- d) All users must receive training from a current UNITY user/employees member respective of their business function within SJA.
- e) Training / Communications
  - i) A UNITY reference guide is available to all new users and is available on the intranet. All updates are added as required.
  - ii) A monthly newsletter is sent to all users regarding any updates, changes or crucial information via email from the National Office.
  - iii) Continual online training is available to all councils upon request to the National Office.



## **Section E.**

### **Human Resource Policies and Procedures**

- Conflict of Interest
- Discipline
- Harassment and Discrimination
- Privacy
- Screening





## CONFLICT OF INTEREST POLICY

<b>Policy Objective</b>	The purpose of this policy is to define conflict of interest and to identify circumstances in which volunteers, instructors, or employees must declare a conflict of interest.
<b>Policy Statement</b>	It is the policy of St. John Ambulance that all volunteers, instructors and employees are to act in the best interests of the organization and are responsible for ensuring that their private affairs do not present any real or perceived conflicts of interest relative to their duties to St. John Ambulance.
<b>Effective Date</b>	April 2006
<b>Applies To</b>	All volunteers, instructors and employees affiliated with St. John Ambulance in any capacity herein after referred to as “individuals”

### Policy Context

Consistent with the Code of Conduct, St. John Ambulance (SJA) pursues all activities with a commitment to basic values and principles of ethical behaviour and integrity. Many individuals within SJA have close personal relationships with each other and with those who have dealings with SJA.

The most common examples of individuals to whom this applies are:

- Relatives by blood or marriage. For the purpose of this policy, a relative shall include parents, spouse (including common-law or same-sex), child (including adopted), siblings and grandparents whether related by blood or marriage (e.g. step and in-laws).
- Partners
- Other persons with whom one has or has had a close, personal relationship.

This policy recognizes the close personal relationships as a reality and a strength of SJA and clarifies what to do when circumstances of actual or potential conflict arise.

### Definitions

The following information provides a definition of conflict of interest with respect to volunteer, instructor and employee activity with SJA. To further define the context and parameters of conflict of interest, situations in which volunteers, instructors and employees may be at risk of conflict of interest are also defined.



*Conflict of interest*—is any situation in which an individual’s private interest or the interest of someone with whom they have a close personal relationship may or may appear to influence his/her duties and obligations to SJA.

An individual is at *arms length* when s/he does not have any direct or indirect interest related to a person with which s/he has a close personal relationship.

### **Examples of Conflict of Interest Situations to be Avoided**

While there is no finite list of the conflicts that could be encountered, some of the more common examples include:

- Offering reduced rates or discounts for SJA services and products;
- Hiring, appointment, promotion and compensation adjustments made by a non-arms length individual either alone or with others;
- Awarding business contracts to persons with whom the decision maker has a close personal relationship;
- Preferential treatment;
- Acceptance of gifts or favours greater than \$50 in value, from customers or suppliers or prospective customers or suppliers except when to do otherwise would be culturally insensitive;
- Borrowing or making use of SJA funds, names, property, goodwill or other assets for other than SJA purposes;
- Use of status with SJA to obtain gain, directly or indirectly, from those doing or seeking to do business with SJA;
- Accepting outside positions which deprive SJA of the time, attention and business judgement required to perform their duties;
- Direct competition with SJA.

### **Policy Requirements**

1. If a conflict does arise between the private interests and the official duties of an individual, the conflict should be resolved in favour of the public interest.
2. Candidates for any position at SJA are expected to declare a potential conflict of interest as part of their application. Candidates must complete the Conflict of Interest Information Form (see Annex 1).



### **Responsibilities/Accountabilities**

National Office is responsible for:

- development of general policy and procedures related to conflict of interest
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Councils and Offices including identifying situations where conflict of interest may arise
- addressing any declared conflict of interest

Provincial/Territorial Councils and Offices are responsible for:

- policy implementation
- compliance review of policy and procedures
- acting in an advisory and support role for local SJA Offices and Units including identifying situations where conflict of interest may arise
- addressing any declared conflict of interest

Local SJA Offices and Units are responsible for:

- policy implementation
- acting in an advisory and support role for local SJA units including identifying situations where conflict of interest may arise
- addressing any declared conflict of interest

SJA volunteers, instructors, and employees (individuals) are responsible for:

- declaring any conflict of interest immediately upon knowledge thereof
- ensuring that their private affairs do not present any real, apparent, or potential conflicts of interest with respect to their duties with SJA;
- ensuring that they do not place themselves in a position where they are under an obligation to any person who might benefit from special consideration or favour on their part or seek in any way to gain special treatment from them because of their position with SJA; and,
- ensuring they do not directly or indirectly use, or allow the use of SJA property of any kind for anything other than officially approved activities.



## **Procedures**

### **Declaration**

1. Individuals who suspect or become aware of a conflict of interest are required to immediately complete the Conflict of Interest Information Form (see Page 6 of this policy) and submit it to:
  - their immediate supervisor, or
  - if the supervisor is not at arms length, to the next most senior person who is at arms length.

### **Meetings**

2. At the start of every meeting or series of meetings, the Chair will ask whether any individual has a conflict of interest to declare.
3. When an individual declares a conflict the Chair will:
  - determine whether the individual is to refrain from participating in or influencing the discussion, and voting, and/or leave during the discussion
  - ensure the declaration of conflict of interest and subsequent steps are appropriately recorded in meeting notes or minutes.

### **Consultation**

4. Any individual who requires clarity on the interpretation of this conflict of interest policy should contact any member of their Provincial or Territorial Management Team. The same applies to those individuals under the umbrella of the National Office.

### **Response**

5. The arms-length supervisor, in consultation with the next most senior supervisor will review and determine whether a conflict of interest exists.
6. The arms-length supervisor will complete the form indicating whether the conflict exists and provide a copy to the individual.
7. If a conflict of interest does exist, the arms-length supervisor will:
  - reach a written agreement with the individual on the means by which that conflict will be removed, avoided or handled;
  - within 48 hours of confirmation of a conflict of interest, review and decide whether and how to change any decisions which were made related to the conflict.



8. A copy of the completed form and in the case of a conflict of interest, the written agreement, must remain on file with the respective Council Office in accordance with the SJA Records Management Policy.
9. All individuals are subject to disciplinary measures including suspension with or without pay, dismissal as a volunteer, termination of employment for just cause or legal action for:
  - failure to report a potential conflict of interest
  - violation of this conflict of interest policy

### **Appeal**

10. An individual may appeal any decision of the arms-length supervisor by writing to the Provincial/Territorial Management Team within 30 days from the date of written confirmation of the decision. This appeal does not suspend the decision of the arms-length supervisor nor that supervisor's ability to make additional or consequential decisions.
11. The Provincial/Territorial Management Team will:
  - Make a decision within 30 days of the receipt of the appeal
  - Respond in writing to the individual and the original decision-maker
  - Make all the final decisions with respect to the conflict of interest.

### **Resources**

SJA Code of Conduct  
SJA Records Management Policy  
SJA Discipline Policy

### **Policy Review**

This policy will be reviewed at a minimum of every three years and as required.







**Conflict of Interest Information Form**

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Please describe below any relationships, positions, or circumstances in which you are involved that you believe could contribute to a conflict of interest (as defined in St. John Ambulance's Conflict of Interest Policy) arising.

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The following agreement has been reached:

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*I hereby certify that the information set forth above is true and complete to the best of my knowledge. I have reviewed, and agree to abide by the St. John Ambulance Conflict of Interest Policy that is currently in effect.*

Declarant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Immediate Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_





## DISCIPLINE POLICY

<b>Policy Objective</b>	The purpose of this policy is to ensure that consistent procedures are used for disciplinary actions and that volunteers receive fair and objective treatment during the disciplinary process.
<b>Policy Statement</b>	It is the policy of St. John Ambulance to initiate disciplinary action, up to and including dismissal from the organization, if: <ul style="list-style-type: none"><li>• a volunteer is unwilling to carry out the duties and responsibilities assigned to him/her by their supervisor(s) in a professional manner,</li><li>• a volunteer breaches any organizational policies</li><li>• volunteer behaves in a manner detrimental to other volunteers employees or contractors with St. John Ambulance or detrimental to members of the public.</li></ul>
<b>Effective Date</b>	January 2005
<b>Applies To</b>	All volunteers affiliated with St. John Ambulance

### Policy Context

St. John Ambulance (SJA) volunteers represent the public face of the organization and contribute to the growth and maintenance of its good reputation. When a volunteer's actions or lack of action have the potential to harm the organization, its stakeholders or its reputation, then the organization is committed to take disciplinary actions.

### Policy Requirements

1. SJA recognizes that supervisors must use their professional judgment when assessing the conduct of volunteers for possible disciplinary action.
2. A volunteer who is being disciplined has the right to be represented and/or accompanied by a person of their choosing throughout the processes outlined under Disciplinary Procedures.
3. The supervisor who initiates disciplinary procedures must disclose all relevant information, including a copy of this policy and the disciplinary procedures, to the volunteer (and/or the volunteer's representative) who is being disciplined.



4. The supervisor who initiates disciplinary procedures must provide the volunteer with all reasonable assistance to resolve the issue (e.g. providing a timely response to requests for information).
5. The supervisor involved in a disciplinary action may consult with persons within the organization or external to SJA (e.g. seeking legal consultation).
6. All disciplinary proceedings must be documented and carried out in a confidential manner. SJA will make every reasonable attempt to ensure that the privacy and confidentiality of records are protected as per federal and provincial legislation and the SJA Privacy Policy.
7. Discipline with respect to harassment and/or discrimination issues will be addressed under the *Harassment and Discrimination Policy*.

### **Responsibilities/Accountabilities**

National Office is responsible for:

- development of general policy and procedures related to discipline
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Offices

Provincial/Territorial Council CEO, which includes a Provincial/Territorial Council Executive Director, is responsible for:

- ensuring that disciplinary procedures are followed and documented
- ensuring that adherence to this policy and procedures comply with applicable human rights statutes
- when necessary, convening an investigation or appointing an investigation committee;
- compliance review of policy and procedures
- delegating all or some of their disciplinary authority with the exception of the decision to dismiss a volunteer from the organization
- referring appeals of dismissal to the Provincial/Territorial Council President/Chair
- acting in an advisory and support role for local SJA Offices and Units

Local SJA Offices and Units are responsible for:

- administering the procedures
- policy implementation
- compliance review of policy and procedures
- development and implementation of applicable procedures as identified by provincial/Territorial Office



Persons in positions of authority within SJA are responsible for:

- complying with the procedures as outlined in this document, and
- reporting to appropriate authorities incidents which fall under the Criminal Code or a provincial Offence Act, or its equivalent.

## **Procedures**

SJA recognizes that supervisors must use their professional judgment when assessing the conduct of volunteers for possible disciplinary action.

### *Issuing a Verbal Warning*

1. When a volunteer's conduct is questionable, the responsible supervisor will have a meeting with the volunteer to discuss issues of concern. The meeting may result in the issue being dismissed. If it is not dismissed, the volunteer will receive a verbal warning.
  - 1.1 If the volunteer receives a verbal warning, it must be documented and retained on the volunteer's personnel record.
  - 1.2 The verbal warning must provide the volunteer with a clear outline of
    - the inappropriate conduct
    - expectations required to correct the inappropriate conduct.
  - 1.3 The verbal warning disciplinary action shall be completed within 30 days from the date that it is initiated.
  - 1.4 The supervisor will meet with the volunteer again, no later than 60 days after the verbal warning has been given. At that meeting the supervisor may confirm that the volunteer's conduct has changed and is now appropriate. If, at that meeting, the supervisor finds that the volunteer's conduct has not changed, then disciplinary action proceeds to the next step, which is to give the volunteer a written warning.

### *Appealing a Verbal Warning*

1. A volunteer may appeal a verbal warning.
  - 1.1 The volunteer must submit a written appeal to a supervisor who is senior to the supervisor who gave the verbal warning. The written appeal must be delivered within 30 days of receiving the verbal warning.

Volunteers experiencing difficulty in providing a written submission (e.g. low literacy level, vision impairment) may do so with the assistance of a representative of their choosing.
  - 1.2 The senior supervisor will review the verbal warning and the appeal. This review will result in the verbal warning being confirmed and kept on file, or overturned and removed from the volunteer's file.



*Issuing a Written Warning*

1. When a volunteer has already received a verbal warning and a second infraction occurs which may or may not be related to the verbal warning matter, a written warning may be given. The responsible supervisor will have a meeting with the volunteer to discuss issues of concern. The meeting may result in the issue being dismissed, or the volunteer will receive a written warning.
  - 1.1 If the volunteer receives a written warning, it must be documented and retained on the volunteer's personnel record, with a copy given to the volunteer.
  - 1.2 The written warning must provide the volunteer with a clear outline of
    - previous inappropriate conduct (e.g. verbal warnings)
    - the inappropriate conduct that led to the written warning
    - expectations required to correct the inappropriate conduct
    - potential disciplinary action for not correcting inappropriate conduct up to, but not including, dismissal or suspension from the organization.
  - 1.3 The supervisor will meet with the volunteer again, no later than 60 days after the written warning has been given. At that meeting the supervisor may confirm that the volunteer's conduct has changed and is now appropriate. The results of this meeting should be documented. If, at that meeting, the supervisor finds that the volunteer's conduct has not changed, then further disciplinary action will be taken.
  - 1.4 The written warning disciplinary action shall be completed within 30 days from the date that it is initiated.
  - 1.5 If the supervisor deems the issue to be serious in nature, the supervisor may refer the issue directly to the Provincial/Territorial CEO or designate who will consider the possible dismissal of the volunteer, thus bypassing the written warning.

*Appealing a Written Warning*

1. A volunteer may appeal a written warning.
  - 1.1 The volunteer must submit a written appeal to the Provincial/Territorial CEO within 30 days of receiving a written warning. Volunteers experiencing difficulty in providing a written submission (e.g. low literacy level, vision impairment) may do so with the assistance of a representative of their choosing.
  - 1.2 The Provincial/Territorial CEO will review the written warning and the appeal. This review will result in the written warning being confirmed and kept on file, or overturned and removed from the volunteer's file.



*Dismissing/Suspending a Volunteer*

1. When verbal warnings and written warnings have not been successful in encouraging a volunteer to change his/her conduct, dismissal/suspension from the organization may be considered. If a volunteer's misconduct is of a serious nature, dismissal/suspension from the organization may be considered even if no previous verbal or written warnings have been given. The volunteer's supervisor will refer the issue to the Provincial/Territorial CEO, who will arrange a meeting with the volunteer. The meeting may result in:
  - a) the issue being dismissed, or
  - b) a written warning that recaptures any issue(s) that may have been communicated in previous verbal and written warnings as well as any additional measures/expectations for changes in the volunteer's conduct, or
  - c) suspension of the volunteer from the organization for a specified period of time as well as written notification of the measures/expectations that the volunteer must meet to be reinstated in the organization, or
  - d) dismissal of the volunteer from SJA
2. When considering a volunteer's possible dismissal, the Provincial/Territorial CEO may, but is under no obligation to, conduct an investigation or appoint a committee to investigate the issue(s) of concern. Based on all available information, the Provincial/Territorial CEO will meet and discuss the disciplinary issue with the volunteer before making a decision.
3. The Provincial/Territorial CEO will ensure that the disciplinary procedure has been documented and retained on the volunteer's personnel record, with a copy of any documentation given to the volunteer.
4. If the issue directly involves a volunteer and the Provincial/Territorial CEO, consideration of the volunteer's dismissal or suspension shall be dealt with by the Provincial President/Chair.
5. The decision of the Provincial/Territorial CEO in paragraphs 1(a) and 1(b) is final and the volunteer has no further recourse.
6. The decision of the Provincial/Territorial CEO in paragraphs 1(c) and 1(d) may be appealed.
7. Steps taken to dismiss a volunteer from the organization shall be completed within two months (60 days) from the time the potential disciplinary action is initiated.



*Appealing a Dismissal*

1. A volunteer may appeal the Provincial/Territorial CEO's decision to suspend or dismiss that volunteer from the organization.
  - 1.1 The volunteer must submit an appeal in writing to the Provincial/Territorial President/Chair.
    - The appeal must be delivered within thirty (30) days from the date of the suspension or dismissal.
    - The appeal must explicitly state the reasons for appealing the decision—disagreement with the merits of the decision, the disciplinary procedures or both.
2. A volunteer who has been suspended or terminated is entitled to be represented in the appeal process by a person of the volunteer's choosing.
3. The Provincial/Territorial President/Chair may review the suspension or dismissal and decide to confirm or overturn the decision. Or, the Provincial/Territorial President/Chair may appoint a committee to review the decision under appeal.
  - 3.1 The committee will be composed of three members of the Provincial/Territorial Council/Board and may include the President/Chair.
  - 3.2 The decision of the President/Chair or committee, if appointed, shall be final and binding.
4. The Provincial/Territorial President/Chair or the committee shall decide the matter under appeal within sixty (60) days from the date on which the written appeal is delivered to the Provincial/Territorial President/Chair, unless that time limit is extended by the Provincial/Territorial President/Chair for good and valid reasons.

*Imposed Suspension:*

A volunteer who is subject to disciplinary action may be suspended (non-disciplinary) by the Provincial/Territorial CEO until the matter is dealt with under this policy and procedures.

A volunteer charged with an Offence under the Criminal Code or a provincial Offence Act, or its equivalent, may be suspended (non disciplinary) from active service by the Provincial/Territorial CEO until such charge or charges have been dealt with at the trial or other disposition of such charge or charges. Either during or after the trial, or other disposition of such charge or charges, the volunteer's case may be considered and dealt with after an investigation required under this Policy.





*Time Extension*

The Provincial/Territorial CEO may extend any time limit specified in these disciplinary procedures, provided that the extension is supported by a good and valid reason.

**Resources**

Harassment and Discrimination Policy

**Policy Review**

This policy will be reviewed at a minimum of every three years and as required.





<b>Policy Objective</b>	The purpose of this policy is to ensure that all people involved with St. John Ambulance enjoy a safe organizational atmosphere free of harassment and discrimination.
<b>Policy Statement</b>	St. John Ambulance is committed to providing a safe organizational environment free from discrimination and harassment. It does not tolerate or condone harassment or discrimination, whether it is between members, or between a member of the organization and a member of the public. It is the policy of St. John Ambulance that harassment or discrimination complaints will be taken seriously and dealt with promptly, thoroughly, fairly and in confidence.
<b>Effective Date</b>	September 2004
<b>Applies To</b>	All volunteers, instructors and employees affiliated with St. John Ambulance in any capacity.

### Policy Context

St. John Ambulance (SJA) recognizes the diverse and multicultural composition of its organization and the communities that it serves, and appreciates the dignity, worth and contribution of its members and clients.

### Definitions

*Complainant*—a person who makes a harassment or discrimination complaint against another person.

*Discrimination*—the act or practice of treating a person differently based on prejudice. Under the applicable Provincial/Territorial human rights legislation, discrimination means a person is treated unfairly because of his/her:

- race, ethnic origin, nationality
- ancestry
- language
- place of origin
- sexual orientation
- same-sex partnership
- gender/sex
- pregnancy



- disability
- receipt of public assistance/social condition status
- creed/religion
- colour
- political beliefs
- citizenship
- age
- marital or civil status

In some cases, discrimination also means a person is treated unfairly because he/she has a criminal record or has been pardoned for a criminal offence.

*Harassment*—any unwanted physical or verbal comment or conduct that offends or humiliates a person. It can interfere with a person’s ability to do a job or obtain a service. The unwelcome comment or conduct does not have to be directed towards a specific person for that person to take offence. Harassment is a type of discrimination, and can take many forms including:

- threats
- intimidation
- verbal abuse
- unwelcome or sexually suggestive remarks or gestures
- requests for sexual favours
- unnecessary physical contact
- physical assault

*Member(s)*—all volunteers, instructors and employees affiliated with SJA

*Respondent*—a person against whom a complaint has been made.

### **Policy Requirements**

1. SJA recognizes that there may be variations in provincial/territorial human rights statutes and that it has an obligation to ensure that policy-related procedures are in accordance with jurisdictional human rights legislation.
2. All members, age 16 and older, are required to take the Respect in the Organization training course, at least once. A record of training is required and added to volunteer profile in UNITY.
3. SJA will make every reasonable attempt to ensure that the privacy and confidentiality of records are protected as per federal and provincial legislation and the SJA Privacy Policy.



- 3.1 If, as a result of a harassment or discrimination complaint, there is disciplinary action, the reason for discipline as well as the nature of the discipline will be recorded in a respondent's personnel file.
  - 3.2 All documentation involved in the complaint process, including the final report, will be maintained in confidence in the office of the Provincial/Territorial CEO. In all instances, such documentation will be kept separate from members' personnel files.
  4. SJA's harassment and discrimination policy cannot limit any person from making a complaint to a Provincial/Territorial Human Rights Commission or from taking any other step that, by law, the person is entitled to take.
  5. Any member who files a complaint
    - can do so without fear of embarrassment or reprisal;
    - may be represented and accompanied by a person of his/her choosing during the interviews related to his/her complaint;
    - will not have the complaint, or the fact that they have filed a complaint, recorded in his/her personnel file; and
    - will be kept informed throughout the process, and advised of the final outcome.
  6. Any member who has a complaint filed against him/her will:
    - receive fair treatment in an environment free of harassment and discrimination;
    - be informed immediately that a complaint has been filed;
    - be informed of the complaint process;
    - be presented with a written statement of allegations;
    - be given an opportunity to respond in writing;
    - have the opportunity to be represented and accompanied by a person of his/her choosing during the interviews related to the complaint;
    - be kept informed throughout the process, and advised of the final outcome.
- Note: If a disciplinary action results from a harassment or discrimination complaint, the reason for discipline as well as the nature of the discipline will be recorded in a respondent's personnel file.
7. Members who feel that they may have been discriminated against or harassed may do the following:
    - Ask the person who is the making the offending comments or acting inappropriately to stop what he/she is doing/saying (see *Informal Resolution of a Complaint*).



- Make a written complaint against the person who is making the offending comments or acting inappropriately (see *Formal Resolution—Written Complaint Process*).
8. All parties involved in the resolution or investigation of a complaint, including the complainant, the respondent, and witnesses, are expected to facilitate the process, cooperate, and maintain confidentiality.

### **Responsibilities/Accountabilities**

National Office is responsible for:

- development of general policy and procedures related to harassment and discrimination
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Offices

Provincial/Territorial CEO is responsible for:

- policy implementation
- compliance review of policy and procedures
- ensuring that harassment or discrimination complaints are taken seriously and dealt with promptly, thoroughly, fairly and in confidence; and,
- ensuring that complaints are handled according to the procedures outlined here
- acting in an advisory and support role for local SJA Offices and Units

Local SJA Offices and Units are responsible for:

- administering the procedures
- policy implementation
- compliance review of policy and procedures
- development and implementation of applicable procedures as identified by Provincial/Territorial Office

Persons in positions of authority are responsible for:

- ensuring that the harassment and discrimination policy is communicated to all members of SJA; and,
- ensuring that complaints are handled according to the procedures outlined here.

Members of SJA are responsible for:

- recognizing and respecting the diverse and multicultural composition of the organization and the communities it serves, and for appreciating the dignity, worth and contribution of each member and client



## **Procedures**

### *Informal Resolution of a Complaint*

1. SJA encourages members to resolve harassment and discrimination complaints between themselves, if possible.
2. If necessary, the complainant or respondent can ask another SJA member or supervisor to provide, on an informal basis, neutral, third party assistance.

SJA recognizes that not all members will feel comfortable speaking directly to an alleged offender. Nor is it appropriate for a member to do so in some circumstances. For example, if the member has spoken to the person who has offended him/her, and the unwelcome comment or conduct persists, or if the alleged offender is the member's supervisor or a senior member of the organization, then the member may pursue formal resolution through a written complaint process.

### *Formal Resolution—Written Complaint Process*

1. A complainant may make a written complaint without any attempt at an informal resolution. At any time, a member may submit a written complaint to his/her direct supervisor or to the Provincial/Territorial CEO.
  - 1.1 The written complaint should document the following:
    - What happened?
    - When did it happen?
    - Where did it happen?
    - What was said/done and who said/did it?
    - Who heard/saw what happened?
    - What did you do at that time?
  - 1.2 If requested, a complainant's supervisor can also initiate a written complaint on the complainant's behalf.
2. The complainant's or his/her supervisor will forward the written complaint to the Provincial/Territorial CEO. The supervisor will not make copies of the written complaint.
3. The Provincial/Territorial CEO may attempt to resolve the matter through discussion or may initiate a formal investigation (see *Investigating a Complaint*).
  - 3.1 The Provincial/Territorial CEO will notify, in writing, the person named in the complaint (the respondent).



*Investigating a Complaint*

1. The purpose of investigating a complaint is to determine whether the complaint is substantiated. Any investigation initiated under this policy will be conducted impartially, thoroughly, sensitively, discreetly, confidentially and in a timely manner.
2. The Provincial/Territorial CEO may conduct the investigation or appoint an impartial investigator or investigation team.
  - 2.1 The investigator or investigation team will:
    - consult with the Provincial/Territorial CEO,
    - interview both the complainant and the respondent as soon as possible,
    - interview witnesses,
    - review pertinent documentation,
    - document the situation accurately and completely, and maintain a complete documentary file,
    - make findings with respect to the complaint,
    - make written recommendations to the Provincial/Territorial CEO,
    - request that members who are involved with or questioned about the complaint maintain confidentiality and not discuss the complaint with anyone else.
3. Where the complaint is substantiated, the Provincial/Territorial CEO shall:
  - determine appropriate corrective action,
  - advise the complainant and respondent of the findings/resolution,
  - monitor the implementation of the corrective action,
  - retain a confidential record in the office of the Provincial/Territorial CEO,
  - ensure that there are no reprisals against the parties involved (except for the imposed corrective action).
4. Where the complaint is not substantiated, the Provincial/Territorial CEO shall:
  - take no further action against the respondent,
  - advise the complainant and respondent of the findings/resolution,
  - retain a confidential record in the office of the Provincial/Territorial CEO,
  - ensure that there are no reprisals against the parties involved.

*Appealing the Decision*

1. Members who are dissatisfied with the outcome of the formal complaint may submit a written appeal to the respective Provincial/Territorial Council Board of Directors and request a review of the decision. The written appeal must explicitly state the reasons for the requested appeal.





2. The written request for an appeal will be provided to the opposite party in the complaint (respondent or complainant) and a written response from the opposite party will be requested.
3. The Provincial/Territorial Council Board of Directors will convene to discuss the matter and may:
  - affirm the decision and disciplinary measures
  - affirm the decision but alter the disciplinary measures
  - institute a new investigation into the complaint.

### **Resources**

Human Rights Commission  
HR and Related Policies  
SJA Privacy Policy

### **Policy Review**

This policy will be reviewed at a minimum of every three years and as required.





## PRIVACY POLICY

<b>Policy Objective</b>	The purpose of this policy is to protect the personal information of all of St. John Ambulance's internal and external stakeholders, and to comply with applicable legislation.
<b>Policy Statement</b>	St. John Ambulance is committed to protecting any and all personal information that it collects on its members, staff, and clients. This policy is intended to ensure that its protection of personal information complies with all applicable provincial/territorial/federal legislations.
<b>Effective Date</b>	January 2004
<b>Applies To</b>	All personnel affiliated with St. John Ambulance in any capacity (paid or unpaid). The Privacy Policy applies to all third party providers, which includes general public instructors who receive personal information for processing. The Privacy Policy applies to all St. John Ambulance policies. Privacy guidelines respecting Community Services shall be contained within the policies and/or procedures for each governance and operational area contained within the NOPP Manual.

### Policy Context

St. John Ambulance (SJA) respects an individual's privacy. We protect personal information and adhere to all legislative requirements respecting an individual's privacy. We do not rent, sell or trade our mailing lists. The information provided to us will be used to deliver our services and to keep the individual informed and up to date on SJA's programs, services and activities. The SJA Privacy Policy is designed to ensure compliance with federal privacy legislation.

### Privacy Principles

- 1. Accountability*  
SJA is responsible for the protection of all personal information under its control.
- 2. Identifying Purposes*  
SJA must document why it is collecting the information before it is collected and advise an individual of new and/or additional purpose for collecting personal information and seek consent unless otherwise required or permitted by law.



3. *Consent*

The individual must consent to the collection, use or disclosure of the information except where required or permitted by applicable law.

4. *Limiting Collection*

The information collected on the individual must be limited to information for the purpose identified by SJA.

5. *Limiting Use, Disclosure, and Retention*

Personal information can only be used or disclosed for the purpose for which it was collected unless the individual has consented or as required or permitted by law.

6. *Accuracy*

Personal information must be maintained as accurate and complete as is necessary for the purpose for which it was to be used.

7. *Safeguards*

SJA must protect personal information against loss, theft and safeguard information from unauthorized access by implementing security safeguards appropriate to the sensitivity of the information regardless of the format in which it is held.

8. *Openness*

SJA has an obligation to make public its personal information protection policies and practices.

9. *Individual Access*

SJA has an obligation to grant an individual access to the personal information that has been collected about them.

10. *Challenging Compliance*

Individuals may direct questions and inquiries with respect to the ten principles outlined above or about our practices by contacting the respective Council within their jurisdiction or the Privacy Officer at National Office of SJA.

**Definitions**

Note: The SJA Privacy Policy is often distributed independently of the NOPP-CS Manual. Therefore, a number of standard SJA terms (e.g. Council, jurisdiction) have been defined here to ensure clarity.



*Clients* – recipients of training courses, products and/or community service programs (paid or unpaid) and donors.

*Council* – SJA operations within each province and/or territory and is controlled by SJA Provincial/Territorial Office (a separately incorporated charity) that is known as St. John Council for *Province/Territory e.g. St. John Council for Ontario*.

*Historical records* – records that are retained on a permanent basis and include

- constitution and by-laws,
- committee, Board of Directors and Annual General Meeting minutes,
- selective retention of building and site contracts, land titles, environmental studies on properties,
- records relating copyright or trademark applications,
- selective retention of financial audits for archival purposes,
- funds – bursaries and scholarships,
- records relating to legal issues, opinions and advice provided to the Board of Directors,
- selective retention of public relations records– newspaper clippings, media relations documents (e.g. press releases),
- risk management records and insurance records,
- donor records,
- member service records,
- community service volunteer admission and promotions in the Order of St. John, and
- commemorative medal recipients.

*Jurisdiction* – refers to the SJA Councils and their respective operating centres (branches), and any community service divisions, units, fellowships, instructors that may be within their respective.

*Members* – Members of the Order, Board Members, volunteers, instructors, and staff.

*Order of St. John* – The Most Venerable Order of the Hospital of St. John of Jerusalem (Order of St. John) is an international charitable humanitarian organization, active in Canada for more than 118 years. SJA is one of two foundations of the Order of St. John.



*Personal information* – is any personal identifiable information that is not the name, title, business address or contact information of an employee of an organization. Personal information about an identifiable individual may be factual or subjective, recorded or not. Personal information refers to or includes:

- all personal information that is collected, used or disclosed within the control of SJA as an organization operating across Canada
- information that is collected, used or disclosed by SJA at all levels of the organization including National Office (federally incorporated charity) and Provincial/Territorial Councils (separately incorporated charities) and their respective Branch(s), Divisions and Unit levels.
- information provided by members (Members of the Most Venerable Order of the Hospital of St. John of Jerusalem (the "Order"), volunteers, instructors, staff, and clients.
- information in all formats including paper-based and electronic and in all locations.

*PIPEDA* – Personal Information Protection and Electronic Documents Act

*Priory Council* – The Board of Directors of the Priory of Canada whose trade name is SJA.

*Record* – any correspondence, memorandum, report, book, plan, map, drawing, diagram, pictorial or graphic work, photograph, film, microform, sound recording, videotape, documentary material.

*Third party providers* — a third party is a company or organization that has been contracted by SJA to provide services. The third party provider may have direct access to personal information. Examples of third party providers may include Management of IT services, mailing house for the distribution of bulk mail, consultants required to develop and/or support a database containing personal information, and the like. However it does not include key internal business functions such as payroll functions.

## **Policy Requirements**

1. Identifying purposes—SJA must document and inform individuals why it is collecting the information before it is collected and advise an individual of new and/or additional purposes for collecting personal information.



- 1.1 A purpose and use statement is required for all personal information collected by St. John Ambulance. A purpose and use statement must be included on any form used for collecting personal information.
  - 1.2 Each description of the purpose for collection of personal information must be accurate and easy to understand.
2. Consent—The individual must consent to the collection, use or disclosure of the information except where required or permitted by applicable law.
- 2.1 For all collections of personal information (regardless of which collection tool is used) SJA is required to ensure consent has been obtained for the identified purpose and/or use of the required personal information and advise the individual of consequences should consent not be obtained.
  - 2.2 If consent is not obtained, the personal information will not be collected or used for the respective purpose.
  - 2.3 “Grandfathering” of consent is not permitted. For example, if past practices have included collecting information on individuals’ hobbies, such a practice is no longer allowed without receiving consent to collect such information. Members and clients must be notified in writing of the SJA Privacy Policy, the current types of personal information that has and is being collected and the respective use of this information.
  - 2.4 Implied consent may be deemed to have been received in the following circumstances.
    - The personal information was collected, used and/or disclosed to provide a product, program and/or service.
    - The personal information was collected, used and/or disclosed while the individual held a position within SJA.
    - The personal information was collected, used and/or disclosed for the purpose of providing someone with an honour or award.
- If implied consent has been received according to any of these circumstances, SJA must therefore limit the collection, use and disclosure of the personal information to the specified purpose.
- 2.5 Existing staff and volunteers will be required to review the SJA Privacy Policy and sign a Statement of Compliance Form (see Attachment A of this policy).
  - 2.6 Should the purpose for collecting the personal information change, consent must be obtained for the new purpose.



- 2.7 SJA will not disclose personal information about any individual without their prior consent unless required or as permitted by law.
3. Collecting Personal Information—information collected on an individual must be limited to information for the purpose identified by SJA.
  - 3.1 Limiting collection—SJA will make every effort to ensure that personal information is not collected from individuals who are thirteen years (13) of age and under unless there is proof of parental consent. At its discretion, SJA will put in place restrictions to the collection, use and disclosure of personal information to limit any potential exposure of a child.
  - 3.2 Tools for collection—SJA uses a variety of tools to collect the information for the required purpose. These collection tools include but are not limited to, Customer Relationship Management software systems (UNITY), registration forms (for training courses, volunteer and/or events), email requests and/or submissions, web forms, fax forms, resumes, references, information provided by telephone call-ins and/or call-outs. The SJA Privacy Policy applies regardless of the collection tool used.
    - Each collection tool must have a brief description of the purpose, use and disclosure of personal information on the SJA Privacy Policy
    - Each collection tool must have a means of withdrawing consent or updating contact information.
    - Each collection tool shall include a consent question for the collection, use and/or disclosure of personal information for a secondary purpose.
    - Each collection tool must be completed up to the stage whereby the purpose of collection has been obtained to ensure that no additional collection is carried out without consent.
4. Limiting Use, Disclosure, and Retention—Personal information can only be used or disclosed for the purpose for which it was collected unless the individual has consented or as is required or permitted by law.
  - 4.1 Retention Schedules—a standard retention schedule for all records, drawn up in accordance with other SJA policies, is a minimum requirement and must be implemented by all jurisdictions, as outlined in the Records Management Policy (see Attachment B of this policy for the SJA Retention Schedule).
5. Accuracy—Personal information must be maintained as accurately and completely as is necessary for the purpose for which it was collected.





- 5.1 Individuals have the right to ensure the information within their file is accurate, complete and unambiguous. Any personal information may be deleted and/or removed should the record be out of date, or if it does not meet the purpose and/or use for which it was intended, with the exception of information required to maintain historical records and accurate statistics.
6. Safeguards—SJA must protect personal information against loss, theft and unauthorized access by implementing security safeguards appropriate to the sensitivity of the information regardless of the format in which it is held.
  - 6.1 SJA shall not sell, rent or trade mailing lists.
  - 6.2 Computer and Internet Security—a standard guideline for computer and Internet security is a minimum requirement and must be implemented by all jurisdictions as contained within the Information Technology Services Policy
  - 6.3 All individuals must be authorized prior to receiving access to databases containing personal information
  - 6.4 Staff Training—all employees and volunteers in supervisory positions must receive information and/or training on how to collect and safeguard personal information in compliance with the SJA Privacy Policy.
7. Individual Rights and Access to Personal Information—SJA is required to grant individuals access to the personal information that has been collected about them. Each member and/or client has the right to:
  - know why SJA collects, uses or discloses his/her personal information
  - know that SJA is protecting his/her personal information and that appropriate security measures are in place
  - ensure that his/her personal information is accurate, complete and up-to-date
  - obtain access to personal information and request any corrections as may be required
  - provide feedback about how an organization handles their personal information.
  - 7.1 Access to personal information located on the national database and/or at the national office, council or branch locations is granted by the national and provincial CEOs to the respective individual required to process the information for the delivery of programs, products and services. See the Procedures section of this policy for details on how to access personal information.
8. Compliance—SJA is required to ensure that its operations and practices comply with federal and provincial/territorial privacy legislation and its own organizational Privacy Policy.



- 8.1 National coordination—a National Privacy Compliance Team shall be comprised of one member identified by each of SJA’s Provincial/Territorial Councils. Each compliance team member shall be known as the Privacy Officer for their jurisdiction and will be directly responsible for ensuring their respective jurisdiction adheres to the SJA Privacy Policy. The National Privacy Compliance Team shall have access to legal counsel as required.
- 8.2 Provincial/Territorial privacy legislation—each Provincial/Territorial Council is required to ensure that it complies with the specific requirements of its provincial/territorial privacy legislation. The Privacy Officer of each Provincial/Territorial Council will attach to this policy the specific privacy requirements in their provincial/territorial jurisdiction.
- 8.3 Complaints—to ensure proper and ongoing implementation of the SJA Privacy Policy, each Privacy Officer is required to report to the National Privacy Compliance Team any complaints and/or issues raised by an individual and/or organization. The Privacy Officer must maintain a log complaints for their respective jurisdiction(See the Procedures Section of this Policy for a description of the complaint process).
- 8.4 New products/programs—employees, members and volunteers who are developing new products and/or programs are required to consult with their local Privacy Officer to ensure that any new product and/or program meets SJA Privacy Policy requirements.
- 8.5 Third Party Non-Disclosure and Compliance Agreements—At a minimum, third Parties must sign an agreement that they will not disclose any personal information gathered or provided to them to perform and/or provide services for SJA. A sample confidentiality and non disclosure policy is available on the SJA Intranet site in The Privacy Toolkit section.
- 8.6 Audit—a committee will be identified within each Council and at the National Office to audit the implementation of the policy. The committee will be comprised of a minimum of two (2) members who shall be appointed by the CEO of the respective jurisdiction.
  - Each Audit Committee is required to complete an annual privacy audit of its local operations to ensure compliance with this policy.
  - Each Audit Committee is required to submit a compliance statement to Priory Council. These compliance statements must accompany and/or be included in annual reports distributed by Councils.
  - Each Audit Committee is required to submit annual findings and recommendations to the National Privacy Compliance Team to include within the SJA Privacy Policy review.



- Individuals may direct questions and inquiries about SJA's Privacy Policy and its related practices by contacting the Provincial/Territorial Privacy Officer within their jurisdiction or the Privacy Officer at National Office of SJA.

### **Responsibility/Accountability**

SJA is responsible for the protection of all personal information under its control.

National Office is responsible for:

- the National Privacy Compliance Team is responsible for the development and implementation of general policy and procedures for the SJA Privacy Policy, including amendments and/or updates
- policy implementation
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Offices

Provincial/Territorial Offices are responsible for:

- policy implementation
- compliance review of policy and procedures
- The Privacy Officer must maintain a log of complaints at the respective jurisdiction.
- ensuring adherence to provincial/territorial privacy legislation
- ensuring changes or amendments to provincial/territorial privacy legislation are noted and complied with
- acting in an advisory and support role for Local SJA Offices and Units

Local SJA Offices and Units (all personnel – paid or unpaid affiliated with SJA and involved in collecting personal information) are responsible for:

- administering the procedures
- policy implementation
- compliance review of policy and procedures
- development and implementation of applicable procedures as identified by Provincial/Territorial Office.



## Procedures

*Procedures for implementing the SJA Privacy Policy are as follows:*

- ensure that information regarding the SJA Privacy Policy is available to members, clients and event sponsors. Standard information forms are available on the SJA Intranet.
- ensure that when collecting personal information, either over the phone, electronically and/or using collection tools such as forms, through a website form and the like, that members are provided with the information as per section 1.0. and consent is received. Where possible, records of consent are retained for the period of time in which the information is to be used.
- provide training and information on the SJA Privacy Policy to all employees, instructors and volunteers.
- review all operational policies to ensure compliance with privacy-related procedures

### *Clients of SJA Community Services Programs*

As a representative of SJA, instructors, volunteers, and employees have an obligation to ensure that our clients are aware of SJA's Privacy Statement as it relates to the delivery of services.

### *New Employees, Instructors, and Board Members*

- All new members must receive a copy of the SJA Privacy Policy and receive training from a designated individual trained on the SJA Privacy Policy within SJA.
- Each new member is required to sign off on the SJA Privacy Policy (See Privacy Compliance Form on page 15 of this policy - Privacy Compliance Form) as having understood their obligations under the policy.
- Members are only permitted to have access to personal information as required to carry out their responsibilities as outlined within their respective position descriptions.

### *Requests for Information on an Individual by a Third Party*

To provide a third party with personal information about an individual, consent must be received from the respective individual.

### *Requests for Access to Personal Information*

1. An individual must submit a written request to the Branch or Council operating in their province/territory to access his/her personal information being held by SJA.
2. Following the acknowledgement of receipt of the request, the Branch Manager or CEO and/or designate will respond to the request within 30 days from receipt of the request, or such other time period as applicable by law.



3. Exceptions to providing access to personal information include:
  - requests for to access nomination information for admission or promotion in the Order specifically, SJA will not provide access to personal information before nominations have been approved, but will provide access to information after nominations have been approved.
  - conflict with another individuals right to privacy, unless consent is received, i.e. divulging complainant's name.

### **Complaint Process**

#### *Submitting a complaint*

1. Complainants must submit a written complaint to the CEO of the related jurisdiction.
2. The CEO will forward the written complaint to the Privacy Officer.
3. The Privacy Officer will acknowledge the complaint by giving a letter of receipt to the complainant within 30 days receipt of the written complaint.
4. The Privacy Officer will enter the complaint in the complaint log and notify the SJA National Privacy Officer of the complaint.

#### *Investigating the Complaint*

1. The Privacy Officer will appraise the complaint and determine the issues and/or validity of the complaint.
2. The Privacy Officer will write a letter to the complainant stating that the complaint has been received and that the complainant will be advised within 30 days whether the complaint is accepted or rejected.
3. If the complaint is rejected, the Privacy Officer will send a letter to the complainant stating the complaint has been rejected and including the rationale for the rejection. The letter will state that SJA now considers the matter to be closed. The complainant may appeal the decision if there has been an error in the review process.
4. If the Privacy Officer validates the complaint, a formal assessment will be undertaken and the complainant will be advised in writing that an investigation will be conducted. SJA will try to complete the complaint investigation process within 30 days following the initial assessment of validity.



- 4.1 The local CEO will decide the appropriate approach for investigating the complaint. A fact finding exercise may include establishing an investigation team consisting of the Privacy Officer and a minimum of 2 other members. The nature and scope of the complaint will determine the need for an investigation team. The investigation team will report their findings to the CEO.
- 4.2 The investigation team may use a variety of approaches to try to resolve the complaint. Acceptable approaches include:
  - interviewing the complainant;
  - creating a dispute resolution process;
  - requesting that a privacy audit team be created to determine whether SJA has not complied with its own policy or federal/provincial/territorial privacy legislation.

#### *Reporting on the Investigation*

1. Investigators will communicate the results of their investigation to the complainant in writing. This letter will also formally indicate that the matter is now considered closed by SJA.
2. The investigation team will submit a summary report to the privacy audit committee and to the Board of Directors of the respective jurisdiction. The complaint will be considered closed.
  - 2.1 As part of compliance and complaint monitoring, the summary report will be shared with the Privacy Compliance Team.
3. Complainants have the right to file a complaint with the provincial/territorial Privacy Commissioner of their respective jurisdiction at any time during the above complaint process.

#### *Appeal Process*

1. Complainants have the right to make one appeal of the final decision of the investigating team.
2. The complainant must submit a written appeal within 30 days of receiving formal written notification of the result of the investigation.
  - Appeals should be submitted directly to the local privacy audit committee.
  - The Privacy Audit Committee is only responsible for reviewing whether a decision made by the investigation team was based on material errors of fact or if the investigation team failed to follow the SJA procedures and /or processes described within this policy.



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3. The decision by the committee will be final and binding. The complainant will be notified in writing of the final decision of the Privacy Audit Committee within 60 days of the initial appeal.

**Privacy Toolkit**

A toolkit has been developed to provide assistance in implementing the policy requirements. These tools are available on the SJA Intranet and include the following:

<b>TOOL</b>	<b>PURPOSE</b>
<i>Collection Tool/Privacy Stmt Worksheet</i>	To identify a sample privacy statement for forms commonly used by SJA.
<i>Consent Form for the Release of Personal Information</i>	To request an individual to consent to the release of his/her personal information to a third party
<i>Council Implementation Guidelines by Department</i>	To provide an outline of departmental responsibilities for the implementation of the SJA Privacy Policy
<i>Policy Directional Statement - Approved Priory Council</i>	To formalize the request for the development of a Privacy Policy from Priory Council to the National Management Team and provide an outline of the 10 privacy principles adopted by PIPEDA.
<i>PP0104-Employee Benefits</i>	To receive consent from employees to forward their personal information to a third party for the purpose of receiving employee benefits
<i>Privacy Acts Across Canada</i>	To provide members with a summary of the various privacy acts across Canada
<i>Privacy Officer - Duties</i>	To provide a summary of the responsibilities of a Privacy Officer.
<i>SJA Privacy Policy [Compliance] Sign Off Sheet</i>	To ensure that volunteers, staff, and instructors have read and understood their obligations within the SJA Privacy Policy
<i>SJA Privacy Policy Statement - Corporate Clients</i>	To be provided to corporate clients
<i>SJA Privacy Policy Statement - Event Sponsors</i>	To be provided to event sponsors
<i>SJA Privacy Policy Statement - SJA Members</i>	To be provided to members
<i>SJA Privacy Policy Statement - Students</i>	To be provided to students
<i>Privacy Q &amp; A</i>	To provide answers to common privacy questions.
<i>Retention Schedule</i>	To provide guidelines to members for the record retention
<i>SJA Privacy Policy</i>	To be provided to any individual on request.
<i>SJA Privacy Policy: Training Presentation</i>	To assist in the education of volunteers, instructors and employees of the SJA Privacy Policy
<i>Understanding Bill C6 - PIPEDA: Training Presentation</i>	To assist in the education of volunteers, instructors and employees of PIPEDA

The toolkit is continually evolving to assist in the implementation of the SJA Privacy Policy and are subject to change. Members should review this section on the SJA internet at least once every three months.





**Resources**

PIPEDA - [www.privcom.gc.ca/legislation/index\\_e.asp](http://www.privcom.gc.ca/legislation/index_e.asp)

Records Management Policy

Privacy Commissioners of Canada's – [www.privcom.gc.ca](http://www.privcom.gc.ca)

**Policy Review**

This policy will be reviewed every 3 years and as required.



## STATEMENT OF COMPLIANCE FORM

St. John Ambulance is committed to protecting the accuracy, confidentiality and privacy of information and to adhering to all legislative requirements respecting the privacy of personal information. All employees, instructors, volunteers and other members who work, volunteer and/or are contracted by St. John Ambulance and who have access to personal information as a means of carrying out their duties and/or delivery of training and community services have a moral and legal obligation to protect an individual's personal information.

I, understand, accept, and will abide by the St. John Ambulance Privacy Policy. I understand that any violation of this policy is unethical and may constitute a criminal offense. Should I commit any violation to the St. John Ambulance Privacy Policy, I understand that my privileges may be revoked; and disciplinary and/or appropriate legal action may be taken.

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Name (Please Print)

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Signature

Date: MM/DD/YY

**Note:** The signed form is to be retained on the personnel file and added as an activity to UNITY.





## SCREENING CYCLE POLICY

**Policy Objective** The purpose of this policy is to ensure safety and quality of service for our members and members of the community by screening those involved in providing St. John Ambulance programs and services.

**Policy Statement** It is the policy of St. John Ambulance to:

- screen all volunteers, instructors, and employees as a condition of their association with St. John Ambulance;
- conduct annual performance assessments for all volunteers, instructors, and employees as part of an ongoing screening process.

**Effective date** January 2005

**Applies to** All volunteers, instructors, and employees affiliated with St. John Ambulance in any capacity, 16 years of age and older. For the purpose of this policy, the term “volunteer” includes adult service volunteers, board chairs, board and committee members and non-members of St. John Ambulance who assist the organization and hold positions of trust or authority (e.g. parents of Youth Program participants)

### Policy Context

St. John Ambulance (SJA) has moral, ethical, and legal responsibilities to the people who use its programs and services, the people who provide its programs and services, and to the community at large. SJA is concerned about the safety of these groups and about its credibility, values and reputation.

SJA personnel are often placed in positions of significant trust with vulnerable people. The wide spectrum of volunteer, instructor, and employee positions varies not only in nature but also in level of risk. The following are typical positions of trust or authority:

- situations in which someone has a significant degree of authority or decision-making power over another, such as leadership roles e.g. Chancellor, Board Members, Unit Leaders, National Office or Provincial/Territorial EDs/CEOs, local SJA Managers, etc.;
- situations where someone has a significant degree of unsupervised access to another person, their personal information, their property, or to the organization’s property;



- situations where the success of the program, service or activity depends on the development of a close, personal relationship between the individuals, as in supervision and mentoring roles;
- situations in which the service being provided renders the client vulnerable, as in personal care services (e.g. first aid and health care);
- situations in which our instructors are in significant positions of trust with recipients of training programs.

Through on-going screening, SJA strives to provide safe, well-managed services to the community and to its volunteers, instructors and employees.

### **Policy Requirements**

1. All volunteers, instructors, and employees are required to participate in an on-going screening cycle throughout their involvement with SJA.
  - 1.1 Applicants who refuse to comply with SJA's screening cycle process will not be accepted into the organization.
  - 1.2 Existing volunteers, instructors and employees who do not comply with the Screening Cycle Policy will be subject to disciplinary action.
  - 1.3 Existing volunteers, instructors, and employees must undergo an annual performance assessment process.
2. Individual Councils are required to use clearly outlined recruiting procedures.
  - 2.1 Councils will establish recruiting procedures and communicate these to all agents involved in the intake of applicants.
3. Application forms must be in line with elements of privacy and must comply with human rights codes.
  - 3.1 Each applicant will be required to complete an application form.
  - 3.2 Applications will be managed by each Council's human resources personnel or designate.
4. Position descriptions will be in place for every volunteer, instructor, and employee position.
  - 4.1 Position descriptions should be well-designed and well-suited to the tasks to be performed.



- 4.2 All volunteer, instructor and employee positions will be assigned for a term agreed on by the supervisor and the member.
5. Screening-in measures are required when candidates are being considered for volunteer, instructor, and employee positions.
  - 5.1 Screening-in measures can include, but are not limited to:
    - reference checks
    - police record checks (PRC)
    - attestation
    - specialized testing
  - 5.2 The screening-in measures applied to each candidate is determined by the nature of the work for which the candidate is applying. Criteria must be used to assess which screening measures will be used with each position. The criteria are:
    - vulnerability of persons served (e.g. youth, senior citizens)
    - access to property (e.g. inventory, property, vehicle access)
    - access to personal information (e.g. management of other volunteers, instructors, employees)
    - degree of isolation (e.g. time spent on a one-to-one basis with another individual);
    - degree of physical contact (e.g. instructors with students)
    - degree of physical demands (e.g. nature of assignment and position description)
    - degree of inherent risk (e.g. dependent on the assignments for patient care)
    - skills and knowledge required
    - degree of supervision
    - degree of trust (e.g. board members).
  - 5.3 The selection process (interview and reference questions, special tests) should be bias-free and objective, and must conform to all applicable human rights statutes and privacy legislation.
6. SJA will make every reasonable attempt to ensure that the privacy and confidentiality of records are protected as per federal and provincial legislation and the SJA Privacy Policy.
  - 6.1 All personal information collected from the screening process must be kept in a secure location in the respective department at the local SJA office, Provincial/Territorial Office and National Office.
    - Only respective departments and, as required, the Provincial/Territorial CEO of the respective jurisdiction may have access to personal information.
  - 6.2 A successful applicant shall have access to his/her file within 30 days following a formal request to the respective department and/or the Provincial/Territorial CEO of the Provincial/Territorial Office.



- 6.3 Information contained in a member's personnel file will not be disclosed without the member's consent unless permitted or required by law. Any complaints regarding the collection, use or disclosure of personal information can be made directly to the CEO of the respective jurisdiction.
7. The accepted applicant's file, once signed and submitted, is considered a corporate file of SJA.
- 7.1 Each applicant's file will be updated and maintained for the period for which the individual is a member of SJA and/or seven years following their departure unless the information is deemed historical. Historical records are defined as:
- funds (bursaries and scholarships),
  - selective retention of public relations,
  - newspaper clippings,
  - media relations,
  - insurance records,
  - donor records,
  - member service records,
  - community service volunteer admission and promotions in the Order of St. John,
  - records of commemorative medal recipients.
- 7.2 Each personnel file shall include the following records and information:
- a checklist for screening steps relating to the position (see Attachment A)
  - police record checks (PRCs) are kept on file during the screening process, but are destroyed at the end of the screening in/out process.

### **Responsibilities/Accountabilities**

National Office is responsible for:

- development of policies and procedures related to the screening cycle for volunteers, instructors, and employees
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Offices

Provincial/Territorial Councils are responsible for:

- policy implementation
- compliance review of policy and procedures
- acting in an advisory and support role for Local SJA Offices and Units





Local SJA Offices and Units are responsible for:

- administering the procedures
- policy implementation
- compliance review of policy and procedures
- development and implementation of applicable procedures as identified by Provincial/Territorial Office

The Provincial/Territorial CEO is responsible for:

- overall management of human resources policies and procedures within their respective jurisdictions, including those related to the screening cycle of volunteers, instructors, and employees.

Personnel involved in the screening cycle process (e.g. supervisors, interviewers, program leaders, instructors) are responsible for:

- adapting position descriptions to reflect local need;
- implementing recruitment strategies and application processes;
- reviewing applications;
- interviewing applicants;
- inserting a written record of interview responses in the applicant's file;
- checking personal and professional references following a standardized process;
- ensuring that any of the following are completed and/or submitted, where required:
  - PRC,
  - specialized tests,
  - attestations;
- completing and maintaining the personnel files of applicants;
- entering successful applicants' information in the national SJA database and searching the database for previous affiliations with other Provincial/Territorial Councils
- managing personal information in compliance with jurisdictional human rights statutes and privacy legislation;
- consulting with a volunteer, instructor, or employee to determine and assign the terms for his/her position;
- ensuring new volunteers, instructors, and employees receive appropriate orientation and training;
- pairing experienced personnel with new volunteers, instructors or employees, when necessary;
- supervising, monitoring, and evaluating the performance of volunteers, instructors, and employees and providing appropriate feedback, including annual performance assessments; and,
- conducting exit interviews.



## **Procedures**

SJA has developed a comprehensive screening cycle for all roles within the organization.

*Planning for New Positions*

*Recruitment*

*Selecting Successful Applicants*

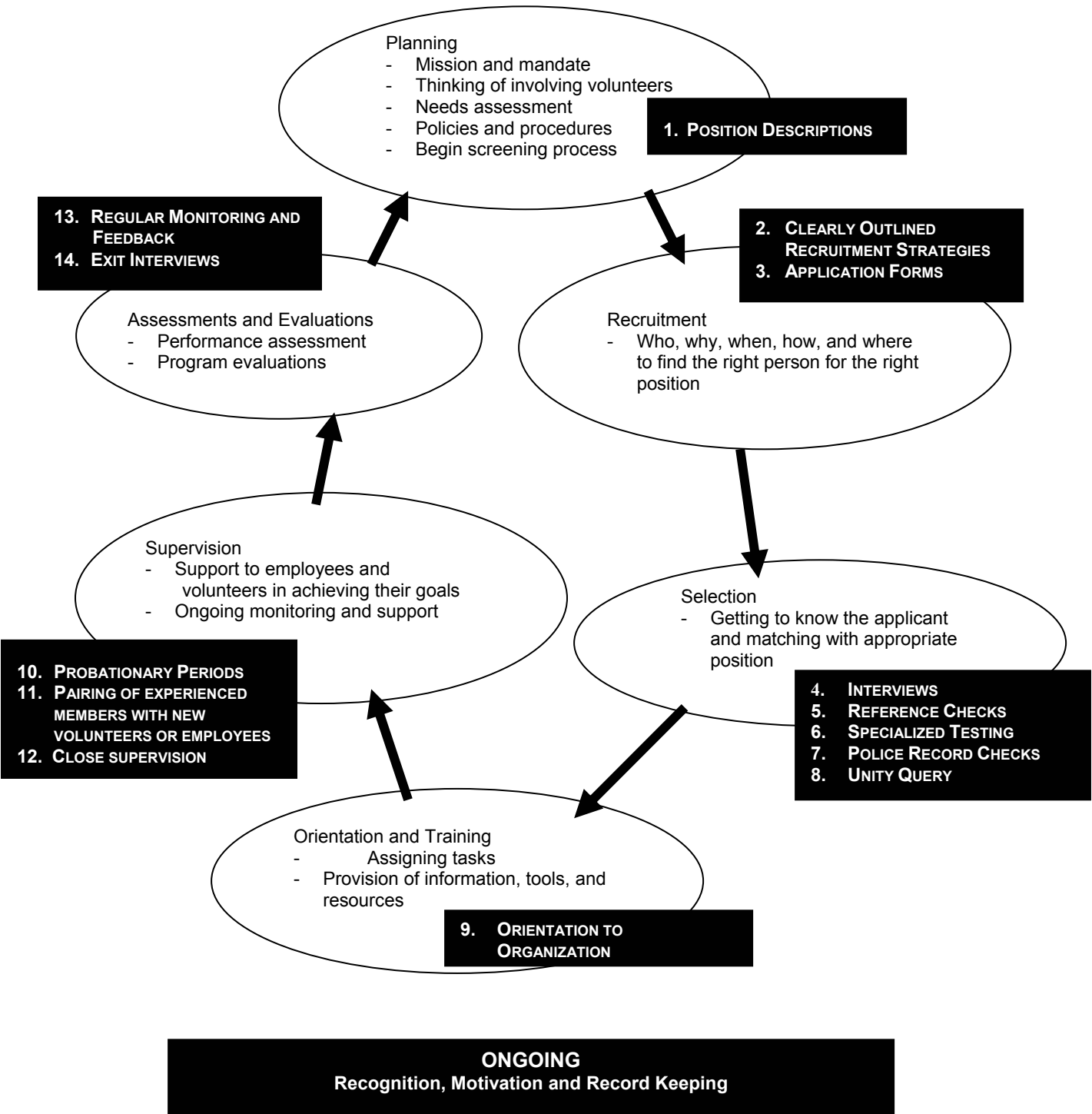
*Orientation and Training*

*Supervision*

*Assessments and Evaluations*

Once a step is completed (e.g. interview, reference check, PRC,) the date is indicated on the checklist and the item is signed off and screening measures are registered in the national UNITY database.

**SCREENING CYCLE FOR ALL ROLES WITHIN SJA**





*Planning for New Positions*

1. Conduct a needs assessment.
  - Refer to the national SJA manual “*Assessing and Meeting the Needs of Your Community*”
2. Developing and adapting position descriptions. The key elements of a position description include but are not limited to:
  - position title
  - term of appointment
  - goals of the position
  - required tasks
  - boundaries and limits of the position
  - required skills/knowledge/experience
  - required qualifications
  - suitability factors
  - description of working conditions
  - description of benefits

The following factors should be considered when designing position descriptions:

- Who are the people who will be participating in the program or service?
- What orientation/training is required?
- What support/supervision/evaluation is required?
- What screening measures are needed?
- What level of risk should be assigned to the position? (Refer to the *Working Effectively with Volunteers – A Volunteer Program Management Handbook, 2005 – Section 12*)

*Recruitment*

1. Develop specific recruitment strategies that target the types of individuals that best fit the position/role. The following questions can be used to help plan your targeted recruitment strategy:
  - What is the job that needs to be done?
  - Who would do this job?
  - Where will you find them?
  - How will you communicate with them?
  - What are their motivational needs?
  - What will you tell them?
  - Who will do it?



2. Have prospective members complete an application form. This form is the minimum screening requirement for all positions since basic demographic data should be kept on file for all members.
3. All applications should be reviewed and volunteer, instructor or employee applicants should be short-listed.
4. All short-listed applicants will be interviewed by the intake agent or delegate. More than one interview might be warranted to ensure the individual's suitability.
5. Refer to the national SJA "*Recruitment Guide*" and the "*Working Effectively with Volunteers – A Volunteer Program Management Handbook, 2005*" for additional information on recruitment strategies.

#### *Selecting Successful Applicants*

1. Planning interviews—The interview provides SJA the opportunity to evaluate the applicant's suitability for the available position. It also offers applicants the opportunity to learn about the organization and its mission.
  - 1.1 The following steps and suggestions will help to plan the interview process.
    - The interview process must be bias-free, objective, and conform to all jurisdictional human rights statutes and privacy legislation. Review your jurisdictional human rights statutes and privacy legislation (beforehand).
    - Set an agenda and clarify the purpose of the interview.
    - Plan the timing of the interview—be cautious about scheduling anything immediately after the interview.
    - Use face-to-face rather than telephone interviews if you have a choice.
    - Conduct the interview privately.
    - Have a minimum of two interviewers.
    - Ensure there will be no interruptions.
    - Allow plenty of time for the candidate to ask questions.
    - Maintain a comfortable distance, facing the person.
    - Show interest in the candidate and his/her responses.
    - Use open-ended questions. For example, ask "How do you feel about working with youth?" rather than "Do you like working with youth?" The second example allows the applicant to respond with a short yes/no answer. The first example encourages the applicant to expand and explain his/her response.
    - Be sure you understand the applicant's responses. When you are unsure, ask for clarification.



- 1.2 The interviewer will complete a written record of the interview responses for the purpose of confirming acceptance or refusal of applicants for specific positions.
2. Interview Questions—The interviewer will use the interview questions that have been developed by SJA for the position in question. Interview questions can be broken down into the following categories, with examples of appropriate questions for each category.
  - 2.1 Awareness of the organization:
    - How did you find out about SJA?
    - What are your thoughts on the material in the information package?
    - What made you decide to become a SJA volunteer/instructor/employee?
    - What obligations/activities do you see yourself participating in?
  - 2.2 Performance factors:
    - Do you know of any reasons or limitations that would prevent you from meeting the requirements of this position?
  - 2.3 Qualifications:
    - What specific skills, education, abilities, or experience are you bringing with you to SJA?
    - How do your qualifications relate to this position?
    - Describe past experiences that relate specifically to this position or other positions in which you have taken on similar responsibilities.
    - In what ways do you feel you are suited to work with SJA?
    - What strengths do you bring? Weaknesses?
    - What qualities do you have that are important for a position such as this?
  - 2.4 Applicant's self-assessment:
    - How do you think others would describe you?
    - Are they correct in their perceptions?
    - What do you expect to achieve through your experience with SJA?
  - 2.5 Limitations—provide position-specific examples and ask:
    - Would you find it difficult to assist in any of the following situations? If so, why?
  - 2.6 Closure:
    - Will your references be prepared to respond to questions?
    - Do you have any concerns/questions?
3. Reference checks—Reference checks provide additional assurance of an applicant's suitability. Careful planning is essential to ensuring objectivity in reference checks.
  - 3.1 Applicants are required to submit at least one personal and one professional reference with their application form. Additional references may be required for positions designated high-risk if the first two references are discordant.



- 3.2 Reference checks can be done in person, by phone, mail, e-mail, or fax. It is recommended that the application interviewer perform the reference checks for any given applicant.
- 3.3 Plan the reference interview (usually conducted over the phone).
- Review your jurisdictional human rights statutes.
  - Ensure that the member has consented to having his/her references checked.
  - Verify factual data provided by the applicant.
  - When asking about performance and behavior, ask open-ended questions and probe for the information you need. For example, ask: “Can you tell me how [name] responded to stressful work situations?”
  - Encourage both positive and negative feedback about the individual.
  - Avoid questions that lead to information that is prohibited on human rights grounds.
  - If you get a negative impression, probe for more information.
  - Keep a written record of the interview.
- 3.4 Use the following questions to guide you in conducting reference checks.
- How long have you known the applicant?
  - In what capacity do you know him/her?
  - Would you say that you know the applicant well? Slightly?
  - What is your current relationship to the applicant?
  - Describe your experience with the applicant?
  - Can you please tell me what you remember most, good, and bad, about this person?
  - Please comment, if you can, on the following traits. How much or how little does this individual exhibit these traits?
    - dependability
    - trustworthiness
    - honesty
    - integrity
    - initiative
    - perseverance
    - patience
    - ability to deal with stress
    - approach to discipline
    - respect for others
    - leadership qualities
    - role model for others
    - tolerance of differences
    - ability to follow through on commitments
  - Has this person ever demonstrated any characteristics of temperament or personality that you believe would cause a problem if he or she were to take on this position?
  - Would you be willing to have this person work on a one-to-one basis with a vulnerable person e.g. child or a senior citizen?



- How well does the person work on his own? As part of a team?
- What would you identify as this individual's strengths? Weaknesses?
- Would you recommend this person to our organization?

4. Specialized Testing

Some roles may require specialized testing/requirements as a component of the screening process. Detailed information regarding specialized testing requirements is available from the applicable supervisor.

5. Police Record Check

A Police Record Check (PRC) is required for specific positions. It is recognized that each province/territory/region may have prescribed parameters within which they must work. Information is available from your local Provincial/Territorial Office about specifics of all steps in the screening process, including those for PRCs, as well as the rights and responsibilities of members within this process (reference Records Management Policy for retention of PRCs). Where federal/provincial/territorial/First Nations/municipal law permits, the following practices are to be adopted.

- 5.1 New applicants (or those changing roles within the organization) requiring a PRC (see Attachment A) will complete a Release of Information Authorization form from their local police service, at their own expense (if any). Reimbursement of any related costs will be at the discretion of the organization.
- 5.2 Provincial/Territorial Offices or local SJA offices (depending on the police jurisdiction) should consider arranging an agency agreement with each police service to ensure that the PRC procedure looks at the appropriate types of convictions. When requesting an agreement, ensure that the checks outlined in Appendix A are included:
  - vulnerable sector screen (e.g. child/elder abuse registry),
  - pardoned sexual offenders database.
- 5.3 Police services vary. Usually, the police service responsible for the potential member's home address conducts the PRC, not the police service responsible for the location of the SJA office/unit in which he or she volunteers/works. Police service process may call for the completed PRC to be given to a SJA office. Consult your local SJA Office or Provincial/Territorial Office to determine the specific procedure for your police service.
- 5.4 **NOTE:** SJA considers the following criminal convictions, unless pardoned, to preclude membership in any capacity:
  - A conviction involving a violent act—anyone who has been convicted of a violent crime against another person.
  - A conviction involving weapons offences—anyone who has been convicted of a crime involving weapons





- A conviction involving child/elder abuse—anyone who has been convicted of abusing a child or elder, physically, emotionally or sexually. Pardons do not affect this exclusion.
- 5.5 **NOTE:** SJA considers applicants with the following criminal convictions as high risk and requires that position-specific screening measures be applied in all cases:
- A conviction involving controlled drugs and substances—anyone who has been convicted of dealing (selling), and anyone who has been convicted with possession of controlled drugs and substances within the past five years.
  - A conviction involving alcohol—anyone who has been convicted of crimes involving alcohol within the past five years.
  - A conviction involving theft without violence—anyone convicted of a crime involving theft over \$2000; anyone convicted of a crime involving theft under \$2000 in the past five years.
- 5.6 SJA may request a police record “re-check” at any time, at its sole discretion. While the degree of risk identified for a position will determine the renewal periods for police checks, reasonable grounds for the check must also be established. The following tables provide general instruction on how to assess the PRC, what to do when the applicant cannot provide a PRC, and how to treat PRCs from existing SJA members. Please check with your Provincial/Territorial Office for specific procedures relative to your Council.



<b>Assessing the PRC of New Applicants</b>		
<b>PRC Assessment</b>	<b>Action</b>	<b>Administrative Steps</b>
No record of convictions	<ul style="list-style-type: none"> <li>• Thank applicant for complying.</li> <li>• Confirm position offer.</li> </ul>	<ul style="list-style-type: none"> <li>• Fill out membership agreement (including sign-off on all SJA policies).</li> <li>• Schedule “Respect in the Organization” training and appropriate orientation.</li> </ul>
Record but conviction does not contravene SJA PRC guidelines	<ul style="list-style-type: none"> <li>• Thank applicant for complying.</li> <li>• Confirm position offer. If unclear as to whether offer should be confirmed, consult Provincial/ Territorial Office.</li> </ul>	<ul style="list-style-type: none"> <li>• Fill out membership agreement (including sign-off on all SJA policies).</li> <li>• Schedule “Respect in the Organization” training and appropriate orientation.</li> </ul>
Record and conviction does contravene SJA PRC guidelines	<ul style="list-style-type: none"> <li>• Consult Provincial/Territorial Office if unsure.</li> <li>• Rescind conditional position offer.</li> <li>• Explain reason why membership is refused.</li> </ul>	<ul style="list-style-type: none"> <li>• Make notes of advice received.</li> <li>• Make notes of discussion with applicant.</li> <li>• Send Letter of Refusal of Membership.</li> <li>• Submit all completed documentation to Provincial/Territorial Office that will retain documentation for six months in case any questions arise.</li> </ul>



5.7 There may be times when applicants cannot provide a PRC. The following resolution guide should be followed:

<b>Applicant Cannot Provide a PRC</b>		
<b>Situation</b>	<b>Action</b>	<b>Next Steps</b>
Landed immigrant—arrived within past year	<ul style="list-style-type: none"> <li>Accept date on the document showing landed immigrant status as PRC.</li> </ul>	<ul style="list-style-type: none"> <li>Indicate PRC equivalent details on personnel file.</li> </ul>
Landed immigrant—arrived over one year ago	<ul style="list-style-type: none"> <li>New PRC is needed.</li> </ul>	<ul style="list-style-type: none"> <li>Same as above.</li> </ul>
Student visa/work visa, SJA member in own country, arrived within past year	<ul style="list-style-type: none"> <li>Obtain reference from supervisor in country of origin to use as PRC date.</li> </ul>	<ul style="list-style-type: none"> <li>Indicate PRC equivalent on personnel file and attach letter of reference to screening package.</li> <li>If no reference is available, accept as a member but not in a position of trust or authority.</li> </ul>
Student visa/work visa, not SJA member in own country, arrived within past year		<ul style="list-style-type: none"> <li>Accept as a member but not in a position of trust or authority.</li> <li>Schedule “Respect in the Organization” training and appropriate orientation.</li> </ul>
Student visa/work visa arrived over a year ago	<ul style="list-style-type: none"> <li>New PRC is needed.</li> </ul>	
Refugee, status has not been granted		<ul style="list-style-type: none"> <li>Accept as a member but not in a position of trust or authority.</li> <li>Schedule “Respect in the Organization” training and appropriate orientation.</li> </ul>
Refugee, status has been granted	<ul style="list-style-type: none"> <li>New PRC is needed.</li> </ul>	
Local police service does not provide PRC service	<ul style="list-style-type: none"> <li>Seek PRC from an alternate police service.</li> </ul>	



5.8 The following resolution guide should be used when evaluating PRCs for existing SJA members.

<b>Police Record Checks for Existing St. John Ambulance Members</b>		
<b>PRC Assessment</b>	<b>Action</b>	<b>Administrative Steps</b>
No record of convictions	<ul style="list-style-type: none"> <li>• Thank member for complying.</li> </ul>	<ul style="list-style-type: none"> <li>• Record details in national database.</li> <li>• Destroy original PRC information.</li> </ul>
Record but conviction does not contravene SJA PRC guidelines	<ul style="list-style-type: none"> <li>• Thank applicant for complying.</li> <li>• Consult Provincial/Territorial Office if unsure</li> </ul>	<ul style="list-style-type: none"> <li>• Record details in national database.</li> <li>• Destroy original PRC information.</li> </ul>
Record and conviction does contravene SJA PRC guidelines (these would be for convictions occurring since the last periodic PRC)	<ul style="list-style-type: none"> <li>• Consult Provincial/Territorial Office if unsure.</li> <li>• Ask member to resign. Thank member for previous service.</li> <li>• If member refuses to resign, consult Provincial/Territorial Office to ensure appropriate steps are taken to terminate the member</li> </ul>	<ul style="list-style-type: none"> <li>• Make notes of advice received.</li> <li>• Make notes of discussion with the member.</li> <li>• For resignation, submit notes as well as national database input request.</li> <li>• For refusal to resign, submit all completed documentation along with database input request to Provincial/Territorial Office.</li> </ul>



Previous St. John Ambulance Affiliation Check

The applicable supervisor will arrange a search on the SJA National Database for all incoming volunteers, instructors, and employees to check previous affiliations with other Provincial/Territorial Councils.

**NOTE:** All SJA members transferring from one geographic jurisdiction to another must undergo full applicant screening, including, but not limited to, careful recruitment, application forms, interviews, reference checks and a new police records check.

*Orientation and Training*

All incoming volunteers, instructors and employees will receive an orientation to the organization and its mission, policies and procedures and to the work which the applicant has been assigned. Orientation related resources and on-the-job training will be provided by the applicable supervisor or his/her delegate. Such training must include SJA's "*Respect in the Organization*" Harassment and Discrimination Training (or the individual must present documented evidence of formal Harassment and Discrimination training having been taken). Each Provincial/Territorial Council should have its own customized Orientation Guide which includes the *SJA Code of Conduct*. Refer to the SJA "*Orientation Guide*"

*Supervision*

1. Each volunteer, instructor, and employee will have a clearly identified supervisor who will be responsible for their day-to-day consultation, supervision, and direction. Supervisors (including program leaders, instructors, etc.) are responsible for ongoing monitoring and support of volunteers, instructors, employees in their areas. Those who supervise volunteers must be familiar with the content of the SJA "*Working Effectively with Volunteers – A Volunteer Program Management Handbook, (2005)*."
  - 1.1 Probationary periods—following acceptance into the organization, members will be required to fulfill a probationary status for the first three months. If an individual moves from one area to another within the organization, the probationary period will once again be reinforced to ensure compatibility and the necessary adjustment has taken place.
  - 1.2 Pairing experienced members with new members—any new member coming into the organization (or someone reassigned to a new role, unit) may be paired with an experienced member (volunteer, instructor or employee) for the requisite orientation and training period. This decision is left to the individual's immediate supervisor.
  - 1.3 Record keeping—personnel files should be maintained and should include progress reports, notice of any problems or concerns and input regarding work performance.



*Assessments and Evaluations*

1. Performance appraisals—the performance of every volunteer, instructor and employee will be assessed on an annual basis. (**NOTE:** While Instructors are formally recertified every three years in most cases, on-going supervision and close monitoring is expected and required.)
  - 1.1 Assessing performance and providing feedback:
    - Evaluation procedures will be constructive, supportive, flexible, and empowering. They will motivate personnel to aim for the highest standards and pinpoint where the individual can best achieve their goals within the organization.
    - The performance assessment should offer the opportunity for members to give input and to negotiate change.
    - Where appropriate, corrective action will be implemented. Refer to applicable SJA policies related to discipline.
    - Regular supervision and evaluation may include:
      - regular performance assessments,
      - random spot checks,
      - periodic reassignment,
      - updated police record checks.
2. Exit interviews—any volunteer, instructor or employee either leaving the organization or moving to another position within the organization will be encouraged and invited to participate in an exit interview. The interview is confidential as to the specific issues raised, but the interviewer shall retain the right to look into any concerns raised by the exit interview. The intent of the exit interview is to help the organization improve its effectiveness.
  - 2.1 Planning and conducting the exit interview:
    - Review your jurisdictional human rights statutes and privacy legislation.
    - Ensure the interview process is bias-free, objective, and conforms to all jurisdictional human rights statutes.
    - Prepare an agenda and determine the purpose of the interview.
    - Discuss reasons for leaving. Ask:
      - Why are you leaving your position?
      - How would you describe your relationship with your immediate supervisor?
      - Do you feel your performance/progress was reflected correctly in your annual performance assessment?
      - How would you describe your relationship with other SJA personnel?
      - How would you describe your work environment?
      - Do you feel you received the necessary tools, training, and support to perform your assigned tasks?



- What changes would you recommend to strengthen the organization?
- What did you like least about your experience with SJA?
- What did you like best about your experience with SJA?
- Would you recommend SJA to others?

2.2 The information collected as part of the exit interview will be used to enhance SJA's operational procedures relating to Community services and will be shared with management for use in program review.

### **Annexes**

**Attachment A** – Screening Methods Based on Risk Assessment Analysis

**Attachment B** – Attestation Form

### **Resources**

Employee HR Policy

Volunteer Program Management Handbook (2005)

Records Management Policy

Assessing and Meeting the Needs of Your Community

### **Policy Review**

This policy will be reviewed at a minimum of every three years and as required.





## Screening Methods Based on Risk Assessment Analysis

	Service volunteers 16 years of age and older in position of trust and/or authority with vulnerable clients	Service volunteers 16 years of age and older <i>not</i> in position of trust and/or authority	Board chairs	Board and committee members (excluding Chair)	Instructors	Employees	Non-SJA in positions of trust and/or authority
Application form	✓	✓	✓	✓	✓	✓	✓
Interview	✓	✓	✓	✓	✓	✓	✓
Signed agreement (including code of conduct, if applicable)	✓	✓	✓	✓	✓	✓	
2 reference checks (unless conflicting, then add 3 <sup>rd</sup> )	✓		✓	✓	✓	✓	
Initial police record check with annual attestation thereafter (where required) and initial vulnerable sector (children, physically or mentally challenged, elderly) check (where required)	✓		✓		✓	✓	
Initial annual attestation (however, additional screening, including reference checks, additional attestations, and PRC may be appropriate for those handling or responsible for funds, property or membership)		✓		✓			✓
Consideration given to police re-checks based on changes in membership role/status	✓	✓					
Orientation and training (including Respect in the Organization)	✓	Where required	✓	✓	✓	✓	Where required
Close monitoring and supervision	✓	✓					✓
3-month probation period, followed by an evaluation	✓	Where required	✓	✓	3-month check-in	✓	Where required
Annual evaluation	✓	Where required	✓	✓	✓	✓	Where required
Regular monitoring and feedback	✓	✓	✓	✓	✓	✓	✓

### Attachment A



## Attestation Form

This form must be completed and signed annually by all St. John Ambulance volunteers, instructors, and employees age 16 years and over. The completed form is due not later than **[insert date]**:

**I attest that:**

I will notify my immediate supervisor if I become the subject of a criminal investigation, if any charges are brought against me, or if my driver's license is suspended or restricted for any reason (provided that driving is a requirement of my SJA role).

*Please fill in personal information and check the appropriate box*

Date: \_\_\_\_\_

Name (please print): \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone Number: \_\_\_\_\_ I am 16 years of age or older: Yes  No

- There have been no occurrences as described above since my last attestation, if any, or in any event, in the previous year; OR
- I reported all occurrences as described above to my immediate supervisor at the time of the occurrence.

I hereby attest that the information disclosed herein is true, complete, and accurate to the best of my knowledge and belief. I understand that false information stated in this attestation shall be sufficient cause for dismissal.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name of Immediate Supervisor: _____
Signature of Immediate Supervisor: _____

Original completed form is to be forwarded to:

*[Council appropriate information inserted here]*

<small>PRIVACY STATEMENT St. John Ambulance is committed to your privacy. Your personal information will be maintained on our database system. Should you wish to access and/or update this information, please contact your Supervisor. For further information about St. John Ambulance's Privacy Policy, please contact your St. John Ambulance's Council's Privacy Officer as listed on <a href="http://www.sja.ca">www.sja.ca</a>.</small>
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**Attachment B**



## **Section F.**

### **Program and Service Policies**

- Medical First Response Services
- Therapy Dog Services
- Youth Program
- Emergency (Disaster) Response Services (under development)





<b>Policy Objective</b>	The purpose of this policy is twofold. Firstly, it is in place to ensure safety through quality of service to the public at community events. Secondly, it is in place to ensure safety and a quality experience for St. John Ambulance Medical First Responder volunteers by outlining the general training and service standards as well as procedures and guidelines.
<b>Policy Statement</b>	St. John Ambulance is committed to providing Medical First Response services to Canadian communities. This commitment includes training, certifying, and monitoring medical first responders.
<b>Effective Date</b>	April 2006 ( <i>Note: this is a phased in program. Complete implementation is expected by December 31, 2006.</i> )
<b>Applies To</b>	All volunteers, instructors and employees affiliated with St. John Ambulance's Medical First Response Services.

### Policy Context

St. John Ambulance (SJA) Medical First Response (MFR) Services encompass the training and provision of first aid and health care-oriented service by trained medical first responders. These services are provided at a variety of community-based settings including, but not limited to, public gatherings, sporting and recreational events. Some additional examples of MFR coverage may include:

- a) ski patrol,
- b) volunteer ambulance services,
- c) bike patrols,
- d) campus response,
- e) emergency response during time of disaster, and
- f) patient care services in hospitals and extended health care facilities.

The MFR services and affiliated standards that are undertaken must be approved in advance by the National Office and respective Provincial/Territorial Council based on jurisdictional need, legislation and capability.



## **Policy Requirements**

1. Enrolment Qualifications—SJA Medical First Responders must be at least 16 years of age and be physically and mentally capable of performing the activities that are reasonable for the type of training they will be undertaking and the service that they will be providing.
  - 1.1 Candidates for MFR enrolment who are 16 or 17 years of age must have the written consent of their parent or guardian to enroll in the MFR program. Candidates for MFR enrolment who are 16 or 17 years of age and who are not residing with their parent or guardian may consent on their own behalf.
  - 1.2 They must hold, as a minimum at the time of enrolment, valid Standard first aid and Level “B” CPR certificates from a nationally recognized training agency.
  - 1.3 Enrolment equivalency for first aid/CPR qualifications will be considered for professional health care providers in active clinical practice; however this will not negate the need to achieve additional minimum standards for performing medical first response activities on behalf of the organization.
  - 1.4 Interested candidates must also comply with St. John Ambulance’s (SJA) volunteer screening cycle requirements. For additional information on these screening cycle requirements and a copy of the SJA Screening Cycle Policy, please contact your SJA Provincial/Territorial Office.
  - 1.5 Following successful enrolment, new members are encouraged to participate in operational training and orientation that should include attendance at patient care events for the purpose of learning (instruction, observing, and assisting) and work with the MFR pre-course materials to develop a base understanding of service delivery prior to and during formal MFR training. It should be recognized that this training, orientation, and development of a pre-course comfort level may take up to six months or more for some members.
  - 1.6 Once volunteers age 16 or older achieve a valid SJA AMFR1 certification, they will be eligible to provide independent patient/client care as Medical First Responders (attached to either a Youth or Adult Service Unit).
  - 1.7 It is also required that those MFR volunteers under the age of 18 be paired with an experienced MFR volunteer for an appropriate period of orientation, assessment and mentorship. Note: While AMFR1 certification is valid for three years, all St. John Ambulance Medical First Responders (regardless of age or unit) will be required to participate in refresher and/or continuing medical first responder education throughout the three year period and will be required to maintain knowledge and skill specific certifications based on provincial/territorial requirements (e.g. AED).





2. Training Standards—The Advanced Medical First Responder 1 course is a comprehensive training program. Volunteers must, as a minimum, complete this course to be a SJA Medical First Responder.
  - 2.1 General certification requirements—to ensure consistency in training and certification, a student will receive a certificate in Advanced Medical First Responder 1 when she/he has successfully completed the training. See the MFR Training Manual for complete training standards and guidelines.
  - 2.2 Certification requirements for Health Care Professionals and Current Medical First Responders—in recognition of the advanced training of many health care professionals and currently certified Medical First Responders, the National Office has developed a process which permits certain health care professionals to complete a written and practical challenge assessment rather than participate in the entire course. The National Office has also developed a Recertification/Challenge process for currently certified Medical First Responders. Recertification is required every 3 years. See the MFR Training Manual for complete information on these processes.
3. Volunteers, instructors and employees involved in delivering MFR Services must follow the procedures outlined in the MFR Training and MFR Services Manuals.
4. Establishing a medical first response unit—to establish a medical first response unit, an initial assessment should be conducted in the community in cooperation with the local Branch and/or Provincial/Territorial Council to determine:
  - program goals and objectives
  - expected outcomes (benefits and risks)
  - financial plan, including anticipated support
  - training and resource requirements.

See the MFR Services Manual for complete details and guidelines on how to establish and maintain a Medical First Response Unit.
5. Mobile Medical First Response Units (Vehicle Operations)—Medical First Responders are required to follow the procedures for vehicle operations as outlined in the MFR Services Manual.
6. Reporting Patient Care Information—for their protection and for continuity of care, Medical First Responders must report, in writing, every instance of patient care rendered by them. Medical First Responders must follow the procedures and guidelines provided in the MFR Services Manual.



7. Occupational Health and Safety—threats posed by viral infections such as Acquired Immune Deficiency Syndrome (AIDS), Hepatitis, and Febrile Respiratory Illness have increased awareness of personal safety in the workplace. Medical First Responders must follow the health and safety precautions and procedures outlined in the MFR Training and MFR Services Manuals.

### **Responsibilities/Accountabilities**

National Office is responsible for:

- development of general policy and procedures related to medical first response services
- development and review of MFR training and service-related standards
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Offices

Provincial/Territorial Council Offices are responsible for:

- policy implementation - delivery and monitoring MFR training and service-related standards and resources, including human resources
- compliance review of policy and procedures
- acting in an advisory and support role for local SJA Offices and Units

Local SJA Offices and Units are responsible for:

- policy implementation
- compliance review of policy and procedures
- development and implementation of applicable procedures as identified by Provincial/Territorial Office

Local supervisor, instructor, volunteer, and employee responsibilities are outlined in the MFR Training and MFR Services Manuals.

### **Procedures**

Complete procedures and guidelines for delivering MFR Services are provided in the MFR Training and MFR Services Manuals.



**Resources**

MFR Training Manual  
MFR Services Manuals

**Policy Review**

This policy will be reviewed at a minimum of every three years and as required.





## THERAPY DOG SERVICES POLICY

<b>Policy Objective</b>	The purpose of this policy is twofold. Firstly, it is in place to ensure quality and safety to Therapy Dog service recipients. Secondly, it is in place to ensure safety and a quality experience for St. John Ambulance Therapy Dog Services volunteers and dogs by outlining the general training and service standards as well as procedures and guidelines.
<b>Policy Statement</b>	St. John Ambulance is committed to providing Therapy Dog Services to Canadian communities based on jurisdictional need. This commitment includes training, certifying, and monitoring Therapy Dog Volunteers (Handlers) and their dogs.
<b>Effective Date</b>	April 2006
<b>Applies To</b>	All volunteers, evaluators, instructors and employees affiliated with St. John Ambulance's Therapy Dog Services.

### Policy Context

It has been demonstrated that the petting, affection, and regular visitation of a dog can be beneficial to institutionalized clients (i.e. patients). St. John Ambulance (SJA) Therapy Dog Services volunteers provide dog visitation to lonely, sick, or shut-in individuals of all ages. These services are provided in a variety of community-based institutional settings including, but not limited to, hospitals and extended care facilities. Extensions of the basic Therapy Dog Services may include but are not limited to visitation to children, visitation to private homes, participation in emergency response activities, and involvement of SJA Youth Program participants.

Therapy Dog Services and affiliated standards that are undertaken must be approved in advance by the National Office and the respective Provincial/Territorial Council based on jurisdictional need, legislation and capability.

### Policy Requirements

1. Enrolment Qualifications—SJA Therapy Dog Volunteers must be at least 18 years of age and be physically and mentally capable of performing the activities that are reasonable for the type of training they will be undertaking and the service that they will be providing.



- 1.1 Generally dogs one year of age and older are accepted in the program and while there is no nationally enforced restrictions on the breed of dog that may participate in the program, it is important to check jurisdictional legislation.
- 1.2 Prospective volunteer handler/dog teams must undergo an orientation and evaluation conducted by a SJA Therapy Dog Coordinator and certified Evaluator. The orientation and evaluation assess the dog's temperament and the team's overall ability to provide safe therapeutic care.
2. Establishing a Therapy Dog unit—to establish a Therapy Dog unit, an initial assessment should be conducted in the community in cooperation with the local Branch and/or Provincial/Territorial Council to determine:
  - program goals and objectives
  - expected outcomes (benefits and risks)
  - financial plan, including anticipated support
  - training and resource requirementsSee the Therapy Dog Services Manual and Facilitators Guide for complete details and guidelines on how to establish and maintain a Therapy Dog Unit.
3. Visitations—Therapy Dog Volunteers are required to follow the procedures for visiting as outlined in the Therapy Dog Services Manual.
4. Keeping a Healthy Program—threats posed by allergies, infectious disease, and zoonosis have been recognized as potential risks. Therapy Dog Volunteers must follow the health, safety and screening precautions and procedures outlined in the Therapy Dog Services Manual.

### **Responsibilities/Accountabilities**

National Office is responsible for:

- development of general policy and procedures related to the Therapy Dog training and service-related standards
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Offices

The Provincial/Territorial Council CEO is responsible for:

- policy implementation
- delivery and monitoring of Therapy Dog training and service-related standards and resources, including human resources
- compliance review of policy and procedures



- acting in an advisory and support role for local SJA Offices and Units

Local SJA Offices and Units are responsible for:

(Local supervisor, evaluator, volunteer, and employee responsibilities are outlined in the *Therapy Dog Services Manual* and the *Therapy Dog Services Facilitators Guide*)

- policy implementation
- compliance review of policy and procedures
- development and implementation of applicable procedures as identified by Provincial/Territorial Office.

### **Procedures**

Complete procedures and guidelines for delivering Therapy Dog Services are provided in the *Therapy Dog Services Manual* and the *Therapy Dog Services Facilitators Guide*.

### **Resources**

Therapy Dog Services Manual  
Therapy Dog Services Facilitators Guide

### **Policy Review**

This policy will be reviewed every three years or as required.







## YOUTH PROGRAM POLICY

<b>Policy Objective</b>	The purpose of this policy is twofold. Firstly, it is in place to ensure quality and safety to Youth Program participants. Secondly, it is in place to ensure safety and a quality experience for St. John Ambulance Youth Program Leaders by outlining the general training and service standards as well as procedures and guidelines.
<b>Policy Statement</b>	St. John Ambulance is committed to offering a structured program that provides Canadian youth opportunities for personal development. This commitment includes training, certifying, and monitoring Youth Program Leaders and participants.
<b>Effective Date</b>	April 2006
<b>Applies To</b>	All persons affiliated with St. John Ambulance's Youth Program

### Policy Context

The St. John Ambulance (SJA) Youth Program provides young people opportunities for personal development and community service, as well as training for first aid, health and safety related knowledge and skills.

### Definitions

*SJA Youth Program*—St. John Junior, Cadet and Crusader Programs together form the Youth Program.

*St. John Juniors*—The St. John Junior Program is an activity program designed for children between the ages of six and ten. It focuses on having fun and earning awards while learning about SJA and community service. Personal development, home safety skills, how to make new friends, and first aid training are strong components of the program.

*St. John Cadets*—The Cadet Program is designed for young people between the ages of 11 and 15. Training and activities in the Cadet Program are designed to provide young people with opportunities for personal development and community service under direct supervision by an adult member or Youth Leader to whom they are accountable, as well as training for first aid, health and safety related knowledge and skills.

It is recognized that youth in the “Cadet” component (Youth Program participants age 11 to 15) sometimes participate in “field trips” to community events where our MFR volunteers are providing patient/client care services. These “field trips” are meant to be educational and may only occur if the youth in the “Cadet” component of the program are accompanied at all times for the duration of the event by a qualified and trained SJA



Youth Leader who is not attending the event as a patient/client care provider. Youth program participants under the age of 16 are not permitted to provide any direct intervention with patients/clients. Learning opportunities may include providing support to:

- administrative and promotional activities
- communication activities
- client reception activities

When planning such “field trips”, it is incumbent upon SJA Youth Leaders to determine the age-appropriateness of the event to be attended for learning purposes.

In rare mass casualty emergencies (e.g. the stands at a soccer game collapse), “Cadet” members could be requested to assist but their actions would be restricted to that of a trained bystander (e.g. steady and support the head, fractures, etc., control bleeding.) In such cases, the Cadet’s aid **MUST** be requested and directly supervised by a qualified SJA Medical First Responder and at no time will the Cadet member be left in a position where they are solely responsible for client care.

*St. John Crusaders*—The Crusader Program is designed for young people 16 and 17 years of age. The Crusader Program provides more advanced first aid training and an emphasis on individual leadership qualities and performing community service under the direct supervision of an adult member or Youth Leader to whom they are accountable. Crusaders can participate in the same activities as Cadets and can take on leadership roles with Juniors or Cadets.

Volunteers age 16 or older who hold a valid SJA AMFR1 certification will be eligible to provide independent patient/client care as Medical First Responders (attached to either a Youth or Adult Service Unit). All MFR volunteers, regardless of age, are required to be physically and mentally capable of performing the activities that are reasonable for the type of service they are to provide. It is also required that those under the age of 18 be paired with an experienced MFR volunteer for an appropriate period of orientation, assessment and mentorship. Note: While AMFR1 certification is valid for three years, all St. John Ambulance Medical First Responders (regardless of age or unit) will be required to participate in refresher and/or continuing medical first responder education throughout the three year period and will be required to maintain knowledge and skill specific certifications based on provincial/territorial requirements (e.g. AED).

*Youth Leaders*—includes any individual age 18 or older given responsibility for the overall administration, training, and supervision of Youth Program participants within the SJA Youth Program.



### **Policy Requirements**

1. Youth Program participants must have the written consent of their parent or guardian to enroll in any components of the SJA Youth Program. Members 16 or 17 years of age who are not residing with their parent or guardian may consent on their own behalf.
2. SJA Cadets must achieve within their first year of cadet status and maintain, as a minimum, a valid Emergency First Aid Certificate and CPR-A Certificate.
3. Candidates for enrollment in SJA Crusaders must achieve within their first year of crusader status and maintain, as a minimum, a valid Standard First Aid Certificate and CPR-A Certificate.
4. Candidates for enrollment as a Youth Leader must hold and maintain, as a minimum, a valid Standard First Aid Certificate and CPR-A Certificate.
5. Youth Leaders and Assistants includes non-SJA individuals such as parents, etc.
  - 5.1 SJA Youth Leaders and Assistants must be at least 18 years of age and be physically and mentally capable of performing the activities that are reasonable for the type of training, supervision, and service that they will be undertaking.
  - 5.2 Youth Leaders are required to comply with SJA's Screening Cycle Policy which includes specific Youth Leader training and delivery standards.
6. Establishing and Maintaining a Youth Program—to establish a Youth Program, an initial assessment should be conducted in the community as per the SJA *Assessing and Meeting the Needs of Your Community* Manual in cooperation with the local Branch and/or Provincial/Territorial Council to determine:
  - program goals and objectives
  - expected outcomes (benefits and risks)
  - financial plan, including anticipated support (business plan)
  - training and resource requirements.
  - 6.1 Youth Leaders must be recruited, placed, trained, oriented, supported, and supervised according to the SJA Screening Cycle Policy in roles that are appropriate to their interests and abilities.

See the *Youth Leaders Manual* for complete details and guidelines on how to establish and maintain a Youth Program.



### **Responsibilities/Accountabilities**

National Office is responsible for:

- development of general policy and procedures related to the Youth Program
- development of Youth Program training and delivery standards
- compliance review of policy and procedures
- acting in an advisory and support role for Provincial/Territorial Offices

Provincial/Territorial Council CEO is responsible for:

- policy implementation - delivery and monitoring of Youth Program training and delivery standards and resources, including human resources
- compliance review of policy and procedures
- acting in an advisory and support role for local SJA Offices and Units

Local SJA Offices and Units are responsible for:

(Local supervisor, instructor, volunteer, and employee responsibilities are outlined in the Youth Leaders Manual)

- policy implementation
- compliance review of policy and procedures
- development and implementation of applicable procedures as identified by Provincial/Territorial Office

Youth Leaders are responsible for:

- the overall administration, training and supervision of Youth Program participants
- adhering to and promoting all SJA policies and procedures

### **Procedures**

Complete procedures and guidelines for delivering SJA Youth Program are provided in the *Youth Leaders Manual*.

### **Resources**

Youth Leaders Manual

Youth Leaders Instructor's Guide

Assessing and Meeting the Needs of Your Community Manual

Cadet Proficiency Subject Manual (Grand Prior's Award program Manual)

Medical First Response Services Manual

### **Policy Review**

This policy will be reviewed at a minimum of every three years and as required.

## **Section G.**

### **Appendix**

- Orientation Guide for Community Services





**St. John Ambulance**

**ORIENTATION GUIDE  
FOR COMMUNITY SERVICES**







St. John Ambulance

## ORIENTATION GUIDE FOR COMMUNITY SERVICES

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St. John Ambulance

## **Introduction**

**Welcome and Congratulations!** You are now a volunteer member of St. John Ambulance (SJA). This is your Orientation Guide, written to tell you about SJA worldwide, with emphasis on the Canadian family of St. John. The guide also contains information specific to your Community Service Unit. You'll find information on your local contacts, meetings, training, and interesting details about your unit and its history.

### **Mission Statement**

#### **For St. John Ambulance in Canada**

*To enable Canadians to improve their health, safety and quality of life by providing training and community service.*

## **History of the Order of St. John**

St. John Ambulance is a world-wide non-denominational charitable organization dedicated to the service of others. The governing body responsible for St. John Ambulance is The Most Venerable Order of the Hospital of St. John of Jerusalem.

SJA has a varied and exciting history dating back over a thousand years. The first recorded history is dated 1023 when the Benedictine monks in Jerusalem devoted themselves to the care of the sick and injured. For further information on the history of SJA world-wide, there are many documents and books available at your local libraries as well as a number of accurate accounts on the Internet.

## **Surprising and Interesting Facts**

1. The Order of St. John was once a formidable naval force keeping the sea routes between Europe and the East open for trade.
2. Much of the medical work of the Order of St. John in the Middle Ages is the basis of the modern health care practised today.
3. In the late 19<sup>th</sup> century in England, SJA started teaching first aid classes on how to help people in workplaces, heavy industry, villages, seaside towns, and the middle class suburbs.
4. SJA was founded in Canada in 1883 when the first First Aid class was held in Quebec City.
5. During the Boer War in South Africa (1899–1902) SJA provided nearly one quarter of the people in the Army Medical Corp.
6. During World War I (1914–1918) SJA, in a joint coordination with the British Red Cross Society, set up a system of medical services and hospitals at the front and behind the lines.

7. During World War II (1939–1945) SJA and the Red Cross worked together to meet the wartime medical and welfare needs both overseas and on the home front.
8. The first major service by SJA in Canada was at the Western Fair at the beginning of the 20<sup>th</sup> century. The Western Fair is an annual event in London, Ontario and continues to have first aid services provided by volunteer members of SJA.
9. The first Youth Division was formed in 1922 in England and in 1933 in Canada.
10. The Therapy Dog Program began in Peterborough, Ontario in 1992.
11. In the 2003 Gulf War, SJA welfare workers from England were sent to the front to give humanitarian assistance to service men and women.

### **St. John Ambulance in Canada**

SJA in Canada was founded in 1883. The Priory in Canada exists as The Most Venerable Order of the Hospital of St. John of Jerusalem. The Priory in Canada is involved in or provides services in the following ways:

1. St. John Eye Hospital is an internationally renowned eye hospital, located in Jerusalem, which treats thousands of patients in either its operating theatre or out-patient department. St. John Canada provides the necessary funding to send one Canadian eye surgeon and one Canadian nurse to the Eye Hospital annually. Optical equipment and funds for special projects are all supported by SJA Canada.
2. Community Services volunteers provide medical first response services at public events as well as improving the quality of life for people through the Therapy Dog visitation program. Our Youth Program provides an opportunity for the personal development of Canadian youth as well as first aid training, health and safety skills, and the opportunity to offer their services at public events.
3. In times of local, provincial, or national emergencies or disasters, SJA provides relief to the affected communities and their citizens, in cooperation with governmental and other non-governmental organizations,
4. SJA First Aid, CPR, and related courses are available across Canada. Instructors, volunteers, and employees provide the highest quality of First Aid training and products, and are guided by a network of healthcare professionals.
5. Bursary programs are available to support SJA volunteers to further their education and careers in nursing as well as furthering their education above the level of a secondary school education.

### **We Were There**

On almost every day of the year, SJA volunteers can be seen at community events somewhere in Canada. Outlined below is a historical list of only some of the unique events that SJA has been called upon for assistance over the years.

1. On September 17, 1949, the passenger ship Noronic caught fire and burned throughout the night while moored in Toronto, Ontario. SJA volunteers were called upon to assist with the evacuation of passengers, transportation of the injured to hospital, and on-site first aid services. In addition, SJA volunteers provided comfort and first aid services for relatives visiting the makeshift morgue set-up on the grounds of the Canadian National Exhibition in the weeks following this disaster.
2. In October 1954, SJA volunteers in Toronto assisted with the evacuation of citizens during Hurricane Hazel.
3. In November 1956, SJA volunteers assisted with first aid and humanitarian aid during the Spring Hill Mine disaster in Nova Scotia.
4. On July 5, 1970, an Air Canada jetliner crashed north of Toronto. Similar to 1949, SJA volunteers worked for several weeks to provide comfort and first aid services for the staff and relatives who visited the makeshift morgue set up on the ice at a local arena.
5. November 1979 saw the largest peacetime evacuation in North America as a result of a train derailment in Mississauga, Ontario. SJA volunteers assisted in the evacuation of many hospitals and homes for the aged located in the affected area. In addition, SJA volunteers provided first aid and health care services at numerous reception centres during the weeks that followed.
6. Heavy rainfall over several days in July 1996 caused the Saguenay River in Quebec to overflow its banks. SJA volunteers assisted with the evacuation of citizens and provided first aid and health care services at various reception centres.
7. During the Manitoba Red River flood in April 1997, SJA volunteers assisted the Red Cross by providing first aid and health care services in many reception centres set-up for the affected communities. In addition, SJA volunteers assisted with sandbagging efforts along the banks of the Red River.
8. January 1998 marked one of the worst ice storms seen in Canadian history. SJA volunteers from Quebec, Ontario, and the Maritimes worked together to provide shelter for victims removed from their homes, first aid and health care services at many reception centres, and assisted local government agencies in the relocation of persons at risk.
9. In September 1998, SJA volunteers worked alongside their Red Cross and Salvation Army colleagues to provide comfort to relatives visiting the site of a passenger jetliner crash in the Atlantic Ocean near Peggy's Cove, Nova Scotia.
10. September 11, 2001 will be a day not soon forgotten. Terrorist attacks in New York City caused global havoc by grounding all commercial airlines. Here in Canada, SJA volunteers in almost every province and territory provided assistance and comfort to displaced passengers as well as first aid and health care services at numerous Red Cross reception centres. In addition, SJA provided a team of paramedics, complete with a fully equipped SJA vehicle, to New York City to assist with providing first aid services to emergency response workers.
11. During the Papal visit in the summer of 2002, SJA volunteers along with many other volunteer agencies, provided first aid services at the various "Way of the Cross" events in Toronto and other parts of Ontario.

12. During an outbreak of Severe Acute Respiratory Syndrome (SARS), SJA volunteers were called upon in Ontario and British Columbia to provide assistance at various screening locations set up outside hospitals and government offices.
13. British Columbia experienced a severe forest fire year in 2003. SJA volunteers provided first aid and health care services at numerous reception centres across the province.
14. Like their colleagues had done previously in Manitoba and Quebec, SJA volunteers in Peterborough, Ontario, were called upon in the summer of 2004 to provide first aid and health care services at Red Cross reception centres when much of the city was flooded.

## **Volunteer Rights and Responsibilities**

### **St. John Ambulance Code of Conduct**

St. John Ambulance (SJA) recognizes the principle of mutual respect for the rights, responsibilities, dignity, and well-being of its volunteers, instructors, and employees.

This Code of Conduct defines the conduct expected of volunteers, instructors, and employees and applies to conduct that occurs when volunteers, instructors, and employees

- a) participate in SJA services, programs, or environments, or,
- b) act or claim to act as designated representatives of SJA.

All SJA volunteers, instructors, and employees will:

- adhere to all applicable human resource, operational/administrative, and program policies and procedures;
- act with honesty and integrity;
- display behaviour that brings credit to the organization;
- advise their supervisor(s) concerning any taken, or contemplated, actions or decisions that they know to be illegal, unethical, or not in the best interest of the organization;
- foster open and honest interaction amongst volunteers, instructors, employees, and clients in an environment free of discrimination, harassment, and abuse;
- promote a healthy and safe organizational environment;
- fulfill their role and responsibilities as stated in their position description;
- only undertake duties and responsibilities for which they have the required qualifications;
- endeavour to improve the quality of services and products provided by the organization;
- support organizational heritage conservation and preservation;
- maintain a high level of confidentiality with regard to personal information and intellectual property.

Note: See *Statement of Compliance Form* – Attachment A

### **St. John Ambulance Commitment to Volunteers**

SJA will do the very best to ensure that your volunteer experience is both productive and rewarding. SJA in Canada is committed to:

- providing adequate information, training, and assistance to enable volunteers to meet the responsibilities of their positions;
- ensuring diligent supervisory assistance to volunteers by providing feedback through regular performance appraisals;
- providing personal injury, illness, and liability insurance for all members (contact your local St. John office for specific information);
- respecting the skills, dignity, and individual needs of each volunteer, and doing its best to adjust to the volunteer's individual needs;
- being receptive to volunteers' comments regarding ways in which we might better accomplish our respective tasks;
- accepting a volunteer's wishes not to fulfill any volunteer assignment that he or she believes to be inappropriate, unsafe, or unacceptable;
- treating volunteers as equal partners with the employees who, with the volunteers, are responsible for accomplishing our mission statement.

### **Your Volunteer Commitment to St. John Ambulance Canada**

As a volunteer with SJA, the organization has certain expectations of you. To serve as a SJA volunteer, you are expected to commit to the following:

- to perform your volunteer services to the best of your ability;
- to meet time and service commitments or to provide adequate notice so that alternate arrangements can be made;
- to adhere to SJA policies and procedures, including record keeping requirements and confidentiality of organization and client information;
- to accept supervision, to abide by the limits of your volunteer position description, and to seek help from the organization in a timely manner with any problems that might arise while you are volunteering;
- to accept that becoming a SJA volunteer is not automatic, and that the organization has the right to release you from your volunteer duties at any time that it believes that doing so is in the best interest of SJA, its clients or its mission;
- to attend whatever training the organization provides, either internally or externally, that is deemed necessary for you to perform your services to the best of your abilities;
- to act at all times as a conscientious member of the team responsible for accomplishing the mission statement of SJA in Canada.

### **Volunteer Recognition**

All SJA members are recognized for their valued contribution to the organization and to their communities. SJA recognizes the outstanding community service of our volunteers by presenting national, provincial, or local honours and awards at various times throughout the year. For details on the honours and awards available to you, please contact your local and/or Provincial/Territorial Office.

## The Order and Priory Awards

As a result of their service performed in support of the Order, volunteers may be recommended for Order or Priory Awards. Check with your Provincial/Territorial SJA Office for details.

### Grand Prior's Award Program

1. The Grand Prior's Award program exists as a way to motivate youth and young adults in SJA to develop a broad range of skills, and to encourage youth and young adults to achieve proficiency in a number of subjects. It is designed to occupy the interest of youth and young adults over a number of years, and to help develop individual competence and confidence.
2. SJA volunteers age 11-21 years of age in Youth or Adult Units may obtain Proficiency Certificates by qualifying in any of the subjects. No more than four Proficiency Certificates may be awarded in any calendar year.
3. When the individual has successfully completed twelve proficiency subjects, the Provincial/Territorial SJA Office will apply for the award of the Grand Prior's Award.

### Grand Prior's Award - Levels of Distinction

1. The Grand Prior's Award - Levels of Distinction are designed to encourage youth and young adults age 11-21 years of age in SJA who complete twelve Proficiency Subjects and earn the Grand Prior's Award to continue working on more Proficiency Subjects. It is an enhancement that leads to three badges for each level of distinction:

<i>Level of Distinction</i>	<i>Upon completion of</i>
Bronze	18th proficiency subject
Silver	24th proficiency subject
Gold	30th proficiency subject

2. Proficiency Subject principles, procedures and criteria are listed in the Proficiency Program Manual.

### Volunteer Service Awards

1. *Qualifying Service* — in order to qualify for volunteer service awards, volunteers must provide at least sixty (60) hours annually of direct (giving) volunteer service on behalf of SJA to the community, SJA or it's membership. Examples include, but are not limited to:
  - providing direct volunteer first aid services at public events if you are a volunteer SJA Medical First Responder;
  - providing direct volunteer therapy dog services at hospitals, long-term care facilities, etc. if you are a volunteer SJA Therapy Dog member,
  - providing volunteer clerical, administrative or leadership services if your assigned SJA role is to provide clerical, administrative or leadership services e.g. Volunteer Administrative Assistant, Unit Supervisor, Committee Chair, etc.,
  - providing volunteer support services if your assigned SJA role is to provide support services e.g. volunteer fundraising, equipment maintenance, etc.,
  - providing SJA-related volunteer instruction or training to others, if your assigned SJA role is to provide such volunteer instruction or training,



- providing direct volunteer service within the community if you are a Youth Program participant.

***For specific information on awards that recognize all SJA volunteer activity (hours), please refer to the "Voluntary Community Services Certificates" and the "Special Service Shield" sections.***

2. A *Service Stripe* is given to Adult and Youth members for each completed three years of qualifying service. The award is one bar for three years, two bars for six years, and three bars for nine years.
3. The *Service Medal of the Order* will be awarded to volunteers who have completed twelve years of qualifying service.
4. *Silver and Gilt Bars to the Service Medal* are awarded for each successive five years of qualifying service. The Service Medal, Bars, medal ribbon, and crosses are worn as follows for years of eligible service:
 

12 years	Service Medal, Ribbon
17 years	Service Medal and 1 Silver Bar, Ribbon and 1 Silver Cross
22 years	Service Medal and 2 Silver Bars, Ribbon and 2 Silver Crosses
27 years	Service Medal and 3 Silver Bars, Ribbon and 3 Silver Crosses
32 years	Service Medal and 1 Gilt Bar, Ribbon and 1 Gilt Cross

For every 5 years additional service, add 1 Gilt Bar and 1 Gilt Cross.

5. Qualifying service by Youth program participants as defined above qualifies for service to the Service Medal of the Order.

### **Voluntary Community Services Certificates**

Voluntary Community Services (Hours) Certificates recognize the accumulation of specific hour milestones of volunteer activity that a member 16 years of age and older achieves.

Volunteer activity hours include:

- volunteer hours for providing direct “qualifying service” on behalf of SJA to the community, SJA, or its membership;
- volunteer hours for attending SJA-related training or meetings, etc.

***For specific information on “Qualifying Service” for Volunteer Service Awards, please refer to the section on “Volunteer Service Awards”.***

### **Special Service Shield**

1. The Special Service Shield (Hours) Badge recognizes the accumulation of specific hour milestones of volunteer activity that a Youth Program participant (age 11 to 15 years of age) achieves. Volunteer activity hours include:
  - volunteer hours for providing direct "qualifying service" on behalf of SJA to the community, SJA, or it's membership;
  - volunteer hours for attending SJA-related training or meetings, etc.

2. Youth Program participants who have completed a minimum of 200 volunteer activity hours will be awarded a red Special Service Shield Badge. On completion of each additional 200 hours of volunteer activity within SJA, a Special Service Shield Badge will be awarded as follows:

- 400 hours green, printed with the number 400
- 600 hours blue, printed with the number 600
- 800 hours bronze, printed with the number 800
- 1000 hours silver, printed with the number 1000
- 1200 hours gold, printed with the number 1200

3. The Special Service Shield Badge may not be worn by members 16 years of age or older.

*For specific information on "Qualifying Service" for Volunteer Service Awards, please refer to the section on "Volunteer Service Awards".*

### **Link Badge Program**

1. The Link Badge Program is to recognize the service and continuity of youth members from one program to another. There are three link badges: Link One recognizes membership completed in the Junior Program, Link Two in the Cadet Program, and Link Three in the Crusader Program.
2. To be eligible for a link badge, a member must have a minimum of one year of qualifying service in the corresponding portion of the Youth Program. It is not necessary for a member to take part in all portions of the youth program to qualify (e.g. someone joining SJA as an adult, who at one time spent a minimum of one year as a junior, is eligible to receive the Link One badge). Any currently active member is eligible to apply for receipt of a link badge(s).

### **Council and Local Awards**

Local Branches, Units, and Provincial/Territorial Councils are encouraged to develop additional awards for Council and local levels, in order to promote excellence of service and retention of members.

For more information on volunteer recognition, contact your Provincial/Territorial SJA Office.

## **Customizing Your Orientation Guide**

This section of the manual provides an outline or template of the specific and unique information that should be included in a customized Orientation Guide. Here is how your specific information should be organized.

### **Outline for Customizing Your Orientation Guide**

1. Important Information About Your Unit
2. Your Unit Program
3. Members of Your Unit
4. Types of Community Service
5. History of the Unit
6. The Future of the Unit
7. Organization Charts
  - Community Service Unit Organization Chart
  - Council Organization Chart
  - National Organization Chart
  - World Wide Organization Chart
8. Unit Information (see Attachment B)
9. National Operating Policies and Procedures – Community Services

The following provides brief descriptions of what to include under each section/heading.

### **Important Information About Your Unit**

This section of your Orientation Guide should provide a brief introduction to your particular unit. An example of introductory wording might be:

*This section of the manual is meant to ensure that you have the information necessary to make your volunteer time with SJA as comfortable, enjoyable, and rewarding as possible. The following sections provide information about your local unit that you will need to help you in your volunteer role. Remember that all Community Service Units in Canada are supported by both the local volunteers and an administrative infrastructure at the provincial/territorial level.*

### **Your Unit Program**

Your guide should provide an outline of your Community Service Unit's program(s). Make sure to note that some of these items/program(s) may change during a year because of unforeseeable circumstances.

- Provide a calendar of meeting nights for the year.
- Provide the training program for the year.
- Make sure that the social opportunities that will occur within and outside of the unit are listed.

### **Members of Your Unit**

Your Orientation Guide should include a confidential list of the present membership. This list is updated annually and distributed to each member. Include the addresses, telephone, faxes, and e-mail of each member. Each member has the right to decide what contact information is shared with the other members of the unit.

### **Types of Unit Activities**

Your Orientation Guide should include:

- a list of the annual community events for which the unit provides services.
- a list of the potential types of service that the unit may be asked to assist with
- other expectations such as participating in parades, annual reviews of the unit, fundraising, etc.

### **History of the Unit**

Your Orientation Guide should provide the following information about your unit:

- when it was registered;
- the reasons for the name and number choice;
- important and exciting events in the unit's history;
- milestones of the unit;
- history of membership and retention.

### **The Future of the Unit**

Your Orientation Guide should state the importance of recruiting new members to sustain the unit and help it grow in response to changing organizational and community needs.

### **Organization Charts**

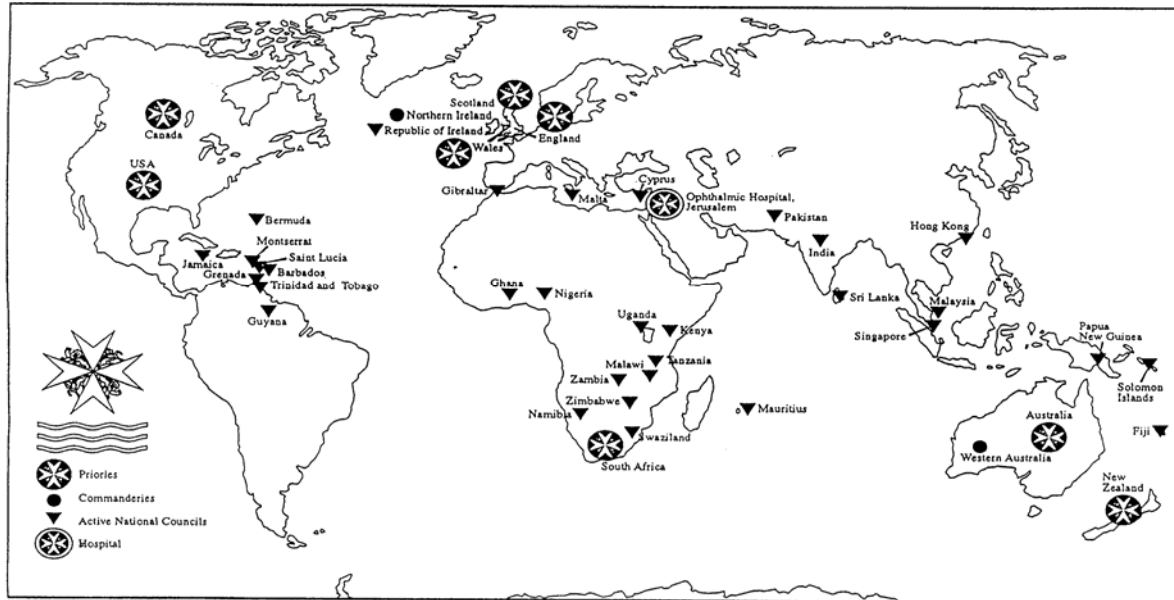
Your Orientation Guide should include the following charts:

- Community Service Unit Organization Chart
  - would include the unit structure including leadership
  - reporting/response lines for the members
- The Council Chart
  - which includes the Unit/Branch/Provincial structure
- The National Organization Chart

St. John Ambulance National Office is located in Ottawa. In addition to the Provincial/Territorial Offices, SJA has over 100 branches across Canada providing training and community services. See the chart on the following page.

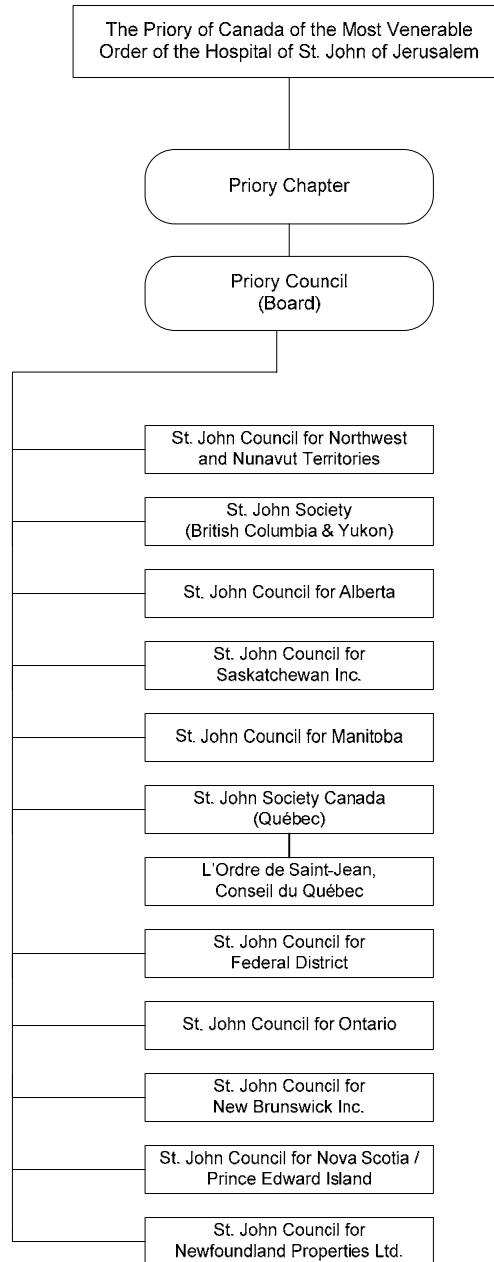
- The World Wide St. John Organization Chart—St. John is a worldwide organization consisting of large structures called Pories (like Canada), and numerous smaller organizations called either Commandries or National Councils.

### St John Establishments





2006  
St. John Ambulance  
Organizational Chart



## STATEMENT OF COMPLIANCE FORM

St. John Ambulance is committed to protecting the accuracy, confidentiality and privacy of information and to adhering to all legislative requirements respecting the privacy of personal information. All employees, instructors, volunteers and other members who work, volunteer and/or are contracted by St. John Ambulance and who have access to personal information as a means of carrying out their duties and/or delivery of training and community services have a moral and legal obligation to protect an individual's personal information.

I, \_\_\_\_\_ understand, accept, and will abide by the St. John Ambulance Privacy Policy. I understand that any violation of this policy is unethical and may constitute a criminal offense. Should I commit any violation to the St. John Ambulance Privacy Policy, I understand that my privileges may be revoked; and disciplinary and/or appropriate legal action may be taken.

\_\_\_\_\_  
Name (Please Print)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date: MM/DD/YY

**Note:** The signed form is to be retained on the personnel file and added as an activity to UNITY.

**Attachment A**





## UNIT INFORMATION

Here is a template for customizing unit information.

**Unit:** \_\_\_\_\_

**Meeting Time:** \_\_\_\_\_

**Unit Contact Person**

a. **Name:** \_\_\_\_\_

b. **Position:** \_\_\_\_\_

c. **Phone:** \_\_\_\_\_

d. **Email:** \_\_\_\_\_

e. **Other:** \_\_\_\_\_

**When We Meet:** \_\_\_\_\_

**Where We Meet:** \_\_\_\_\_

**Uniform and ID :** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

a. **Who Provides My Uniform and ID** \_\_\_\_\_

\_\_\_\_\_

b. **When Do I Wear My Uniform and ID:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**St. John Ambulance Canada National Operating Policies and Procedures – Community Services (NOPP-CS)**

SJA’s National Operating Policies and Procedures – Community Services contains national volunteer policies and procedures. It is important that you familiarize yourself with the policies and procedures that affect your volunteer role with SJA.

Contact your local SJA office for further information.

**Attachment B**

