THE BRITISH COLUMBIA ASSOCIATION OF HEALTHCARE AUXILIARIES
Spring Conference – Kamloops, 2024

BEST PRACTICE, POLICIES AND PROCEDURES

presented by Lynda Avis





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HOUSEKEEPING

- Keep a clean, organized house
- Maintain the house
- Keep a safe house
- Establish a happy house









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What is Best Practice? Essentially a form of Housekeeping

- It is a method or technique that has been generally accepted as superior to any alternatives.
- It produces results that are more successful to those achieved in other ways.
- It is the accepted standard way of doing things in most countries.



Example of Best Practice or Common Practice

- Scene: The Olive Market, Casablanca, Morocco
- Cast of Characters: Lynda, Bruce, Local businessman
- Businessman notices Lynda.





Bartering is Common Practice in Morocco

and camels are prized possessions

Pointing to me, local businessman says to Bruce:

“I’ll give you 1000 camels for her.”

Never one to miss a deal, Bruce responds:

“Make it 1500, and she’s yours’!”



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A Generous Offer Indeed

- The going rate
- for a woman is 57 camels.



How do you establish Best Practice?

- Engage workers (volunteers are stakeholders)
- Have clear Procedures and Policies in place
- Reward effort
- Remain committed
- Be enthusiastic
- Be clear and transparent
- Emphasize Team effort
- Hold regular and professionally run meetings

Vulnerability

- We are all vulnerable at times
- Organizations are made up of human beings
- Workers, Volunteers, Stakeholders
- Each person is an individual
- Each person has their own particular vulnerabilities
- Therefore, collectively, organizations can be vulnerable

What is meant by ‘your vulnerability’?

- Definition of Vulnerability: It is a consequence of the fact that there are forces at work outside ourselves that can be hostile, aggressive and difficult.
- We therefore need to protect ourselves, in this case, we need to protect our organization by BEING PREPARED. This, of course, can most certainly be applied to our personal lives as well.
- By having Policies and Procedures already in place, we are able to act in a professional and direct manner, making us less vulnerable.

Take it from the Boy Scouts



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Policies and Procedures are People-Oriented and People-Driven



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EVERY ORGANIZATION NEEDS TO ESTABLISH POLICIES AND PROCEDURES TO BE SUCCESSFUL

- In the case of auxiliaries, all volunteers need to be **clear** about the level of expectation from the very beginning
- If the level of expectation is clear, the road ahead is **clear**

It is now a matter of beginning!



What is the difference between By-laws and Policies?

- By-laws are structural
- By-laws set basic rules of operation, rules as to how the organization will function: meeting times, election and terms of officers
- By-laws by the very name must be obeyed: they are laws, they are legally binding
- By-law changes must be approved by membership
- Policies are how the organization will be managed
- Policies can be set by elected board without agreement of membership (although I recommend consultation)
- Policies change as the organization changes, grows more complex

POLICIES AND PROCEDURES

What is a policy?

A policy is a symbol of intent.

What is a procedure?

A procedure is how you implement and complete a policy.

Here are examples of Best Practice **Policies** and **Procedures** to implement them.

1. Work continuously to improve the skill level of your volunteer workforce.

- Be sure your Orientation program is up to date, thorough and clear
- Provide professional development e.g. courses for Auxiliary treasurers/bookkeepers, seminars in Meeting Protocol for Executive members, marketing workshops for Thrift Store managers and Executive Public Relations volunteers
- Mentors are important
- A seed once nurtured, grows stronger
- Confidence is built



2. Move with the times and the new technology





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Use technology more efficiently

- Be sure your website is current and effective – use Google analytics for measurement
- Utilize effective technology to raise awareness – go further than Twitter and Facebook – use the most current social media options – You-tube, blogs and podcasts, to spread your message
- Frequently distribute Auxiliary newsletters, meeting announcements and event promotion via email or other social media options.
- Reduce waste in paper and time wherever you can – you will improve the quality of your message, appear more current and professional

3. Effective Meetings

- Provide agenda well ahead of meeting time, invite additions
- **Start on time**
- Agenda should include adjournment time
- Keep to agenda order
- Maintain order, encourage participants to raise hands before speaking
- Encourage all members to participate
- Be sure adequate minutes are kept and distributed shortly after
- Remind members of the primacy of the table
- **Do all the work in the open – no side meetings**
- As for motions, don't allow them to be made on the fly, give notice of intention,
- There is no emergency so great that the motion has to be made without enough thought
- **End on time**

Policies and Procedures of The Apple Valley Hospital Auxiliary

- One manual which includes Policies and Procedures for the operation and administration of the entire organization
- Addendum with Policies and Procedures for the Auxiliary Gift Shop and Thrift Shop
- Manual available on-line
- Hard copies available for those without computers
- Don’t include policies and procedures in the Registered By-laws of your organization



Policy and Procedures Manual

- Make available a copy to all volunteers
- Review the manual with a new volunteer to ensure clarity
- In the manual, include History of your organization, Orientation and Training policy, length of probation period to measure the fit, Constitution and By-Laws, membership fee structure, volunteer jobs and role descriptions
- Manual should include information about the B.C. Association of Healthcare Auxiliaries, reasons for membership, details of educational and networking opportunities
- Arrange for return of manual (if a hard copy) in case of a volunteer leaving the organization

Continued:

- Auxiliary Membership fees – amount, collection process, due date, use of fees
- Policy re dismissal of a volunteer
- Provision of auxiliary uniform, return policy
- Policy regarding problems that arise and how they will be resolved
- Do you want Manual to include an established, accepted Code of Conduct and Ethics? **Good idea!**
- Policy for maintaining an Auxiliary Education Fund to enable participation in conferences, professional development opportunities
- Policy regarding travel expenses incurred, per diem allowance for meals

It was the scientist, **LOUIS PASTEUR,** who said:

LUCK FAVOURS THE PREPARED.

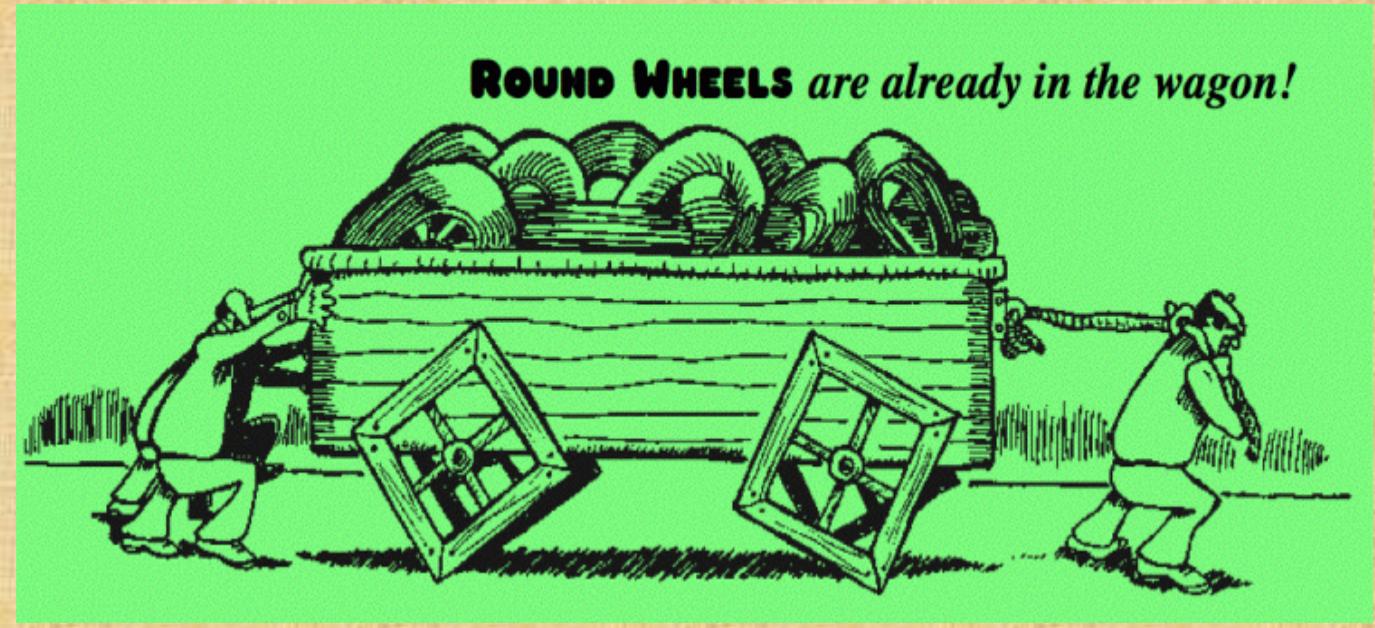


Does your organization have a Policy and Procedures Manual? So, why have one?

- It provides clarity for all volunteers, new and old
- It defines the level of expectation
- It takes the personal out of difficult situations
- It provides supportive documentation to back up legal and regulatory compliance
- Recognize that without an accepted Policy and Procedures Manual, your organization is unprotected and the executive unprepared in case of legal action, therefore your organization is **VULNERABLE**

The way forward……Writing the document

- Don’t always reinvent the wheel
- Look to your fellow BCAHA member auxiliaries
- Many have excellent Policy and Procedures Manuals already in place
- They are willing to share their expertise and experience
- Borrow ideas
- Adapt for your own needs



We sit down to write the document.

- Consider asking an outsider to draw up a draft document, as he or she will bring a new perspective
- Use precise language, be clear and succinct
- Decide on and include disciplinary actions if policies and procedures are broken, and who will administer the disciplinary actions
- Verify that your policies are legal which may cost you some money but it will be money well spent if the organization ever faces a legal or regulatory action
- Prepare a draft for your membership
- Obtain final approval from your membership
- Members will be more likely to adhere to a document to which they feel ownership

Once you have an accepted policy and Procedures Manual in place…..

- Review every year to be sure you are still in compliance with any legal or regulatory changes
- Attend BCAHA Conferences and Presidents Meetings for the opportunity to network and find out how other auxiliaries are operating
- Remember, another auxiliary may be doing something in a better way
- Compare notes and find out what is working for them
- Be flexible and open to change

Provide adopted manual to every volunteer

- Provide each and every volunteer in your organization with your adopted Policy and Procedures Manual
- Decide whether or not you wish a volunteer to sign a document that states he or she has read and accepts the conditions set out in the manual and if so, include this policy in the manual
- Don’t expect every volunteer to retain what is in the manual, memories can be short
- **Provide adequate orientation, on-going training, and mentorship to achieve success**

Every Organization's Policy and Procedures Manual should contain a policy for dismissing a volunteer

- Take time to discuss the formulation of this policy
- Research
- Obtain advice from an H R specialist
- Check the Policies and Procedures of other organizations regarding this action
- Preparation and clarity are key to success
- Remember **"Luck favours the prepared."**



Dismissing a volunteer can be difficult but abiding by Best Practice will make process easier.

- Remember the 4 c's:



- Process should be carried out with care, clarity, concern and compassion
- By the very nature of the word "volunteer" we recognize that we are dealing with a person who has a good heart, Be kind
- Focus should be "that it was their idea to go"

DOCUMENT EVERYTHING!







Record everything from the beginning!

- Start with the first complaints regarding behavior
- Retain all emails, texts, hard copy communications
- Make note of any verbal complaints or discussions
- Note dates of meetings with person in question and content of same
- Keep detailed records regarding any Executive discussions e.g. who was in attendance, any decisions made

- **DOCUMENTATION CAN BE KEY IN CASE OF ANY LEGAL ACTION BROUGHT BY A VOLUNTEER WHO IS DISMISSED**

Assessing the exit

- Discussion at executive level, always ‘in camera’
- Never discuss an individual volunteer at a general meeting or in separate volunteer gatherings e.g. coffee meetings, parking lot meetings, chatter at a fundraising event
- Ask fellow executive members if dismissal is really necessary?
- Identify the policy that has been breached and the procedure your manual dictates and follow to the letter. Deal with problem directly and do not send general email epistles. This encourages a back and forth. **Gets you nowhere.**
- **Always best practice to encourage volunteer to leave willingly**
- Suggest a coffee chat in a neutral location with the volunteer in question

The Coffee Chat

- Be sure to recognize the volunteer's service
- Present the problem as you see it
- Would it be solved by additional training?
- Is there a stressful medical or family problem?
- Would a change to a different volunteer job solve the problem?
- During chat, assess the volunteer's competency to do the job
- Set a trial period e.g. one month



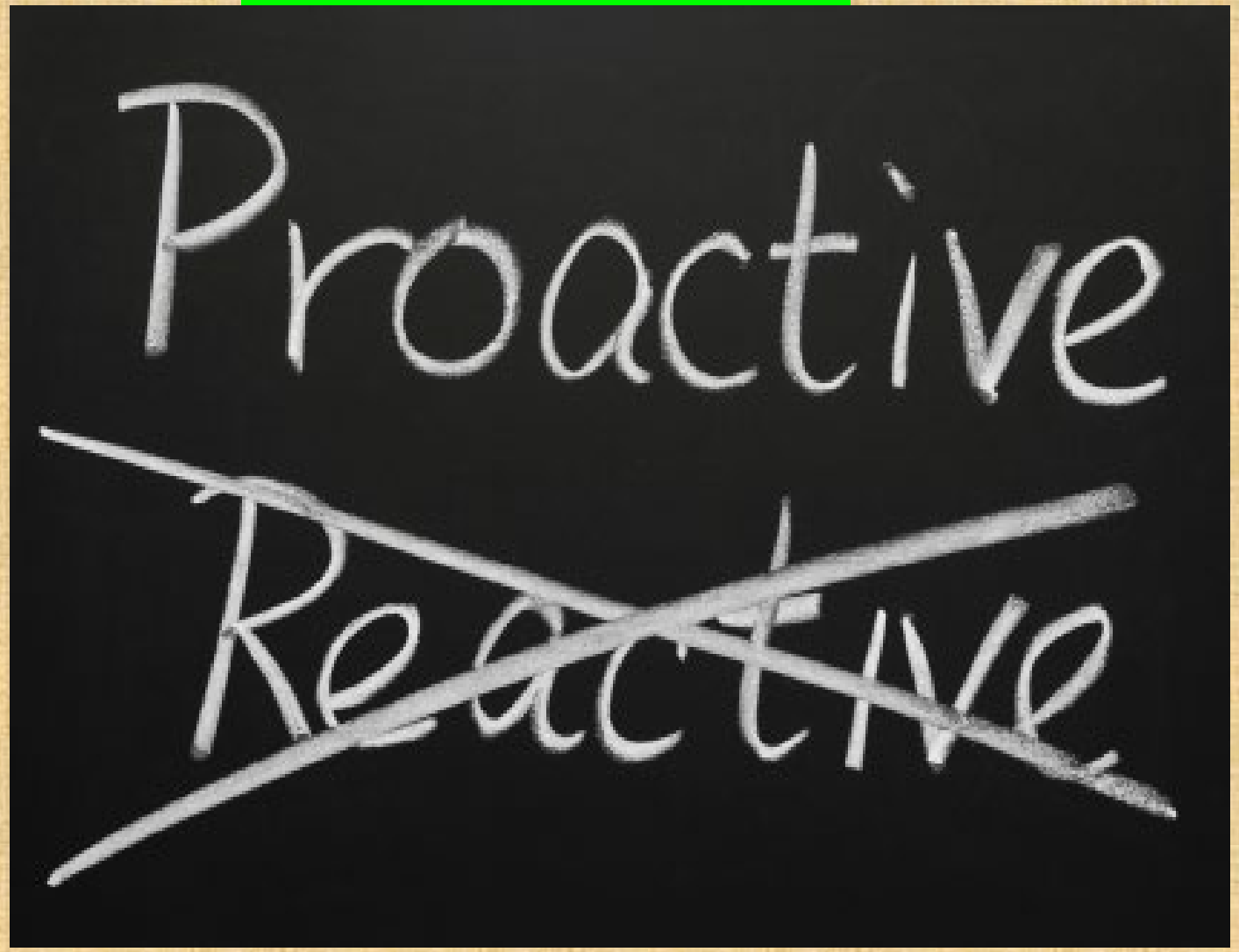
Point of No return

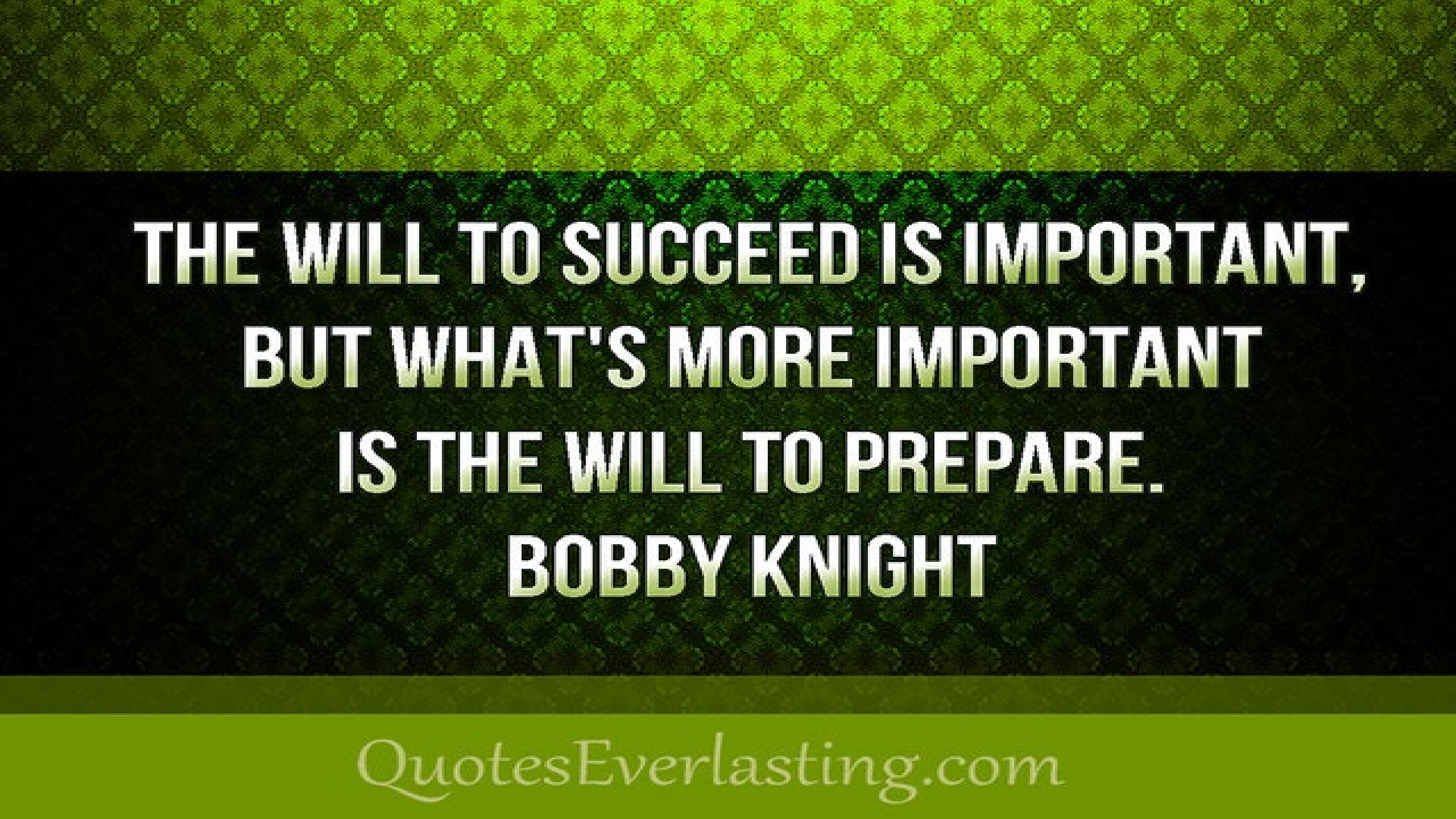
- Be sure you have a disciplinary procedure in place if there has been a gross breach of misconduct, criminal activity
- If the problem has arisen due to the volunteer's inability to interact positively with fellow volunteers, be sure that there is a policy and procedure in place that covers this problem
- Schedule a meeting with the volunteer in a professional space and include another member of the executive or manager from the area wherein the volunteer works
- Encourage prior to the meeting that the volunteer is welcome to bring along another volunteer or friend
- Now the **Exit Meeting**

The Exit Meeting

- During the exit meeting, be clear and precise
- Discuss the trial period
- Review the policy and procedure which is being implemented and summarize why it is being implemented
- Recognition of past service
- **Say as little as possible, don't elaborate or belabour, stick to the point**
- Reiterate that the implementation of the organization's accepted policy and procedures ultimately ensures continued success of the team
- Put it in writing, send registered letter, so you have a record of official notification

Best Practice with Effective Policies and Procedures allows you to be




THE WILL TO SUCCEED IS IMPORTANT,
BUT WHAT'S MORE IMPORTANT
IS THE WILL TO PREPARE.
BOBBY KNIGHT
QuotesEverlasting.com