



Straight Talk: Volunteers and Confidentiality

By Debbie Anderson

I was recently part of one of those annoying conversations -- yet again -- about the merit of trusting volunteers with confidential information. The worst part of this particular exchange was that the contributors to the discussion all work closely with volunteers. I was flabbergasted to say the least. Initially, I counter-argued their discussion points. A lively debate emerged that was taken hostage by the “non-trusters” and I wasn’t able to assert my points. I left the conversation feeling frustrated, angry and defeated. How many years have we been fighting this battle? What must happen for volunteers to be truly engaged in the process, able to contribute their valuable skills and be valued for their contribution?

I am not a newbie to this field. For more than a decade, I have been one of many VRM’s advocating for organizations to accept volunteers as equal team members. To trust them with the information they need to perform their duties effectively. To include them in the exchange of sensitive information so that they can be placed in positions, given responsibilities that do the most for our organizations, and ultimately, the people we serve.

The conversation did stumble upon and quickly flee from the topic of the “great divide.” Boards of directors head our organizations up. These volunteers are ultimately responsible for organizational operations, legal risks and success at meeting identified community needs. They are trusted not only with information, but also with decision-making about highly confidential matters like staffing issues, financial status, client populations, future planning, etc. Then there is a gap – in it fall staff – who for some reason doubt the trustworthiness of volunteers at the other end of the spectrum, the ones providing these important services. Where does that gap come from? How is it that some volunteers can be trusted and not others? Are Board members are more capable? I don’t buy it. Board members are by and large, subject to little or no screening. Program volunteers generally complete complex screening protocol while board members are “referred.” Now I know that some organizations do better than this, but not many!

Program volunteers are also more likely to receive more training. Many board members are not subject to a thorough orientation. On the boards I’ve participated I have been lucky to receive a Board manual, that I was asked to read independently and never been questioned about afterwards. Program volunteers typically attend a session at which they learn organizational history, mission, vision, programs, confidentiality, health and safety, and other important related information. I know of very few organizations where the VRM screens and orients Board members to the organization, despite the fact that s/he is most likely the best positioned to do so. I encourage you as volunteers on boards and paid leaders in your organizations, to advocate creating and employing better screening and training for board members. I also encourage discussions about the VRM at least assisting, if not leading those processes.



One of the comments in this exasperating discussion was about the circles where volunteers travel and with whom the information can be linked. My question is 'do staff persons travel in circles?' Does each of us, regardless of pay status, not have family, friends, and others that we could possibly leak information? Of course we do!

I have heard the opinion that "it's about level of commitment." Is staff *really* more committed than volunteers are? Yes, there are volunteers who come on board and don't make long commitments or keep the commitment they make. However, there are staffs that do the same! I know volunteers who have supported organizations for 20, 30, 40 and even 50 years! That is commitment defined. I would guess that those long serving individuals were probably given positions of responsibility and trusted with the information necessary to do their jobs well.

There is also the argument about qualification. Staff presumably have more skills, intellect, ability and expertise and are therefore better equipped to handle potentially vulnerable knowledge. This is true, in some cases. Volunteerism is more open to more people, including those with low education levels and various disabilities. That said, in studies of voluntary contribution, it is repeatedly found that people with higher education levels are more likely to be volunteers. Individuals, who have established esteemed professional careers, spent a lifetime building valuable transferable skills and gaining higher-level knowledge are often the ones organizations are protecting confidential information from. The majority of non-profit organizations face financial pressures that can negatively affect their staffing choices, resulting in hiring staff that are not as educated, experienced or qualified because they are willing to work for a lower wage. Now I'm not saying that all non-profit organizations hire incompetent staff! I know that too many of us are well qualified yet underpaid. What I am saying is that we should not paint volunteers, or staff, with the same brush just because of the remuneration they receive for their contribution.

Then there is the contention of accountability. Organizations somehow trust that staff is more liable for their actions, more understanding of the impact their representation can have on the organization. There are penalties for staff who do not demonstrate accountability. Are there not consequences for volunteers who neglect to demonstrate accountability? If adequate policy is in place, volunteers can be held responsible and face consequences like suspension, removal of responsibility and dismissal. A recently established law in Ontario Canada, the Personal Health Information Protection Act, even denotes that volunteers can be held financially responsible for significant fines if they breach confidentiality.

I'm sure that you have heard these, and many other reasons, against sharing confidential information with volunteers. I believe for every argument against, there is an equally convincing dispute for providing the information necessary on a need to know basis. After much thought on the issue the only logical conclusion that I can come to, is power. Information is power. Staff can at times, be intimidated by the role volunteers play. They can fear for their employment security and their perceived, more prestigious role in the agency. Protecting information is one way they feel they can protect themselves. Now there may be other schools of thought on the subject, but



let us assume that power is truly what the debate boils down to. Power struggles are generally instigated by fear. Fear is best overcome through knowledge. Our best attempt to challenge this misconception then, is education. We need to become advocates for including volunteers as partners on all levels. The time, apparently, to sway thoughts, is not in a heated debate that is escalated by the pressure of time when placing a new volunteer. Education must be ongoing, a regular part of our communication to others in the organization. Consider some of the following actions we can take to improve perceptions about volunteers and confidentiality:

Positive Talk: From hallway conversations to staff meetings, we have opportunities to highlight the important work done by volunteers and how they are a trusted part of our team. If there is a breach of confidentiality by a volunteer (which by the way I have only known to happen three times in literally thousands of potential instances), it is important to manage the risks. Of course, the Executive Director, the volunteer's supervisor and possibly the board need to be informed. However, as highly confidential information that it is, it should not be advertised to the masses. It is critical to deal with situation as the one time instance that it truly is. If information about a volunteer breach is shared with staff, make sure that they are also aware of the outcomes and consequences placed on the guilty volunteer.

Communicate Legislation and Liability: Research legislation that affects volunteers in your region and let staff know about it. Draw attention to policies (or if not already in place, write and get them approved and communicated) that govern volunteers and their responsibility for confidentiality in your organization. Learn about how your insurance protects the organization from liability caused by a breach of confidentiality by staff and volunteers alike and then share that information with both staff and volunteers.

Elaborate on the Details of Screening, Orientation and Training: We talk about these things in general terms but many staff is not truly aware of the depth of the process. Tell them about the question(s) you ask applicants during interviews that address confidentiality. Let them know what you teach new volunteers during orientation and training about confidentiality and the important role it plays in their work for the organization.

Coach Misguided Staff: Scheduling an hour-long meeting with a doubting staff member is a better use of everyone's time than having that individual limit the positive impact volunteers can have on the work we accomplish on an ongoing basis. Hear their concerns; ask questions that prompt them to share their apprehensions and let them know the safety measures you have in place to protect clients and the organization.

Collaborate with your ED and Rally the Board: If leadership is educated, aware and believe volunteers can be trusted, staff will eventually come around. Given that Board members are volunteers themselves, they may be shocked to learn that the exchange of information from them to staff is stopped before reaching direct service volunteers. They may be your best allies in changing mindsets and clarifying misconceptions.



Set an Example: How are volunteers involved in supporting your department? Would you trust them to interview applicants? Do you have confidence in a volunteer to check references? What confidential information do you share and what level of responsibility do you allow volunteers to take? If we're not walking the walk how can we have such expectations of others?

These are just a few ideas we can implement to initiate a culture change. Whenever possible, we must communicate how we aim to prevent a breach from happening in the first place and what steps will be taken in the event that one should occur. I fear that the road to acceptance will not suddenly become smoothly paved, but rather one that continues to have many bumps and turns that we must navigate to build the faith that staff need to fully engage volunteers as the partners they have the potential to be. What I know for sure is that it will be worth the effort and frustration. I know deep down that it's the right thing to fight for because the potential risk is so low and the prospective gain is so high.

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Celeste Sauls-Marks

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