



**UNIVERSITY  
OF ALBERTA**  
**FACULTY OF MEDICINE & DENTISTRY**  
**Volunteer Procedure**

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|-------------------------------------------------|-------------------------------------------------------------|
| <b>Office of Accountability:</b>                | Dean of Faculty of Medicine and Dentistry                   |
| <b>Office of Administrative Responsibility:</b> | Vice Dean(s) of Research, Faculty of Medicine and Dentistry |
| <b>Approver:</b>                                | Dean's Executive Committee                                  |
| <b>Scope:</b>                                   | <b>All types of volunteer activities within the FoMD</b>    |

**Purpose:** The purpose of this document is to outline the procedures and risk management framework for the engagement and management of volunteers within the Faculty of Medicine and Dentistry (FoMD) at the University of Alberta. This procedure provides specific guidance for FoMD volunteer activities.

**Scope:** This procedure applies to all volunteer engagements within the FoMD, including but not limited to:

- Event support (e.g., symposiums, public health campaigns, or outreach).
- Research-related support that does not replace paid positions.

**This procedure does not apply to:** Students who are participating in research activities that are for course credit, as well as medical students and residents participating in a research project as part of their UME or PGME training.

### **Definitions**

- **Volunteer:** A person who freely offers services without financial remuneration and is not acting as a staff member, student, or faculty member in the capacity of their volunteer role or patients engaged as research partners in research studies.

- **Volunteer Activities:** Tasks undertaken willingly for the benefit of the faculty, without expectation of compensation. However, research-related support in clinical contexts (e.g., participant recruitment, survey distribution, qualitative interviews) may overlap with paid positions. Such tasks may only be performed by volunteers if the Office of Research determines they support, rather than displace, paid roles. Volunteer activities must not replace roles governed by employment agreements or involve grant preparation, financial compensation, or authorship of academic publications.
- **Access to sensitive environments** (e.g., core facilities, secure facilities, data servers, ConnectCare) is generally not granted to volunteers unless explicitly approved by the Office of Research and only when critical to the role's purpose.

## **Procedures:**

### **A. Internal Approval by the Office of Research**

Before initiating a volunteer request, faculty members, Principal Investigators (PIs), or supervisors must obtain internal approval as follows:

#### **1. Submission of Request:**

- a. The faculty member, PI, or supervisor completes a [FoMD Volunteer Request Form](#) including:
  - i. Volunteer role description, tasks and duties.
  - ii. Justification for the need for a volunteer (e.g., program, event, or research support).
  - iii. Duration of the placement.
  - iv. Estimated number of hours per week the volunteer will be engaged.

#### **2. Departmental Review:**

The request is submitted to the Department Chair or Institute Director for review and initial endorsement

#### **3. HR Approval**

Once endorsed by the Department Chair, the FoMD HRP reviews the request for compliance with employment agreements, risk management, and legal standards before approval recommendation to the Office of Research.

#### **4. Office of Research Review:**

- a. The form is forwarded to the **Office of Research** for final review or distribution to the appropriate Vice-Deans or delegates.
- b. The Vice-Deans (or delegate) will evaluate the request based on:
  - i. Alignment with FoMD's priorities and strategic goals.
  - ii. Confirmation that the role does not displace paid staff or students.
  - iii. Compliance with risk management and institutional policies.

#### 5. **Approval or Denial:**

- a. If approved, the Office of Research notifies the requestor in writing within 2 weeks of receiving the [FoMD Volunteer Request Form](#).
- b. If denied, the Office of Research provides reasons for the decision and may suggest alternative solutions.

#### **B. Requisites for Volunteers**

- **Age:** Volunteers must be at least 18 years old unless participating in an approved program for minors.
- **Immigration Status:** International volunteers must confirm that their immigration status permits unpaid volunteer activities.

#### **C. Training and Orientation** All volunteers must complete a mandatory orientation that includes:

- Health and safety protocols, including review of hazard assessment(s). (**Consult with the FoMD Safety Advisor, Jennifer Nam - [jcnam1@ualberta.ca](mailto:jcnam1@ualberta.ca)**)
- Confidentiality and privacy agreements.
- Task-specific training and responsibilities.

#### **D. Risk Management**

1. **Insurance Eligibility:** Approval by the FoMD (including HR and Office of Research) is an internal requirement, but does not confer insurance or liability coverage. Volunteers are only covered under the University of Alberta's general liability insurance after they are formally registered through the University's volunteer registration portal.
2. **Mandatory Registration and Waiver Process**
  - a. After FoMD approval, departments must ensure that the volunteer completes

the official university registration via: [Volunteer Registration – Risk Management](#)

b. Once the registration form is submitted, **Risk Management generates a waiver and sends it directly to the volunteer for signature.** The volunteer cannot begin their activities until this waiver process is completed and registration is confirmed.

### 3. **Injury and Incident Protocol**

In the event of injury:

- a. The volunteer must immediately notify their supervisor.
- b. An [Incident Report Form](#) must be completed.
- c. Follow prescribed medical care processes. The HR Service Partner and Risk Management team will assist with any required follow-up or claims.

### 4. **Record Keeping**

Departments are responsible for:

- a. Verifying that the volunteer has completed the university registration and waiver process.
  - b. Retaining a copy of a police background check, if required.
  - c. Retaining a copy of the signed waiver if it is shared with the department.
5. All records must be securely stored at the department level in accordance with university policy.

## **E. Supervision**

Volunteers must be supervised by an assigned FoMD faculty or staff member to ensure compliance with approved roles and policies.

## **F. Restrictions on Volunteer Work**

Volunteer activities must not:

1. Replace roles designated for paid staff (e.g., NASA positions).
2. Be used for grant preparation or compensated tasks.

3. Lead to financial remuneration or credit as a co-author on publications.

**Review:** This document will be reviewed on an annual basis, or as needed, to ensure its continued compliance with the University's policy on space and the needs of investigators in the Faculty of Medicine and Dentistry.