

# OAKVILLE SENIORS' SERVICES

## Policies and Procedures

Oakville Senior Citizens'  
Recreation Centre  
263 Kerr Street  
Oakville, Ontario  
L6K 3B4

Sir John Colborne Recreation  
Centre for Seniors  
1565 Old Lakeshore Road  
Oakville, Ontario  
L6L 6N1

Iroquois Ridge  
Older Adults Centre  
1051 Glenashton Drive  
Oakville, Ontario  
L6H 6Z4

River Oaks  
Mature Adults Club  
2400 Sixth Line Road  
Oakville, Ontario  
L6H 3M8

Queen Elizabeth Park  
Older Adults Centre  
2302 Bridge Road  
Oakville, ON  
L6L 2G6

**December 2013**

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## **1.0 Introduction & Scope**

Mission Statement – To provide a welcoming, accessible and supportive environment for Oakville seniors that embodies social, educational, recreational, health and wellness activities. Programs and services are unique and dynamic, supporting the continuous well-being of seniors and responding to their changing needs.

Vision Statement - To be Centres of Possibility and Purpose for adults over 50.

Policies & Procedures includes policies for Oakville Senior Services which includes the Oakville Senior Citizen's Recreation Centre, the Sir John Colborne Recreation Centre for Seniors and, where applicable, the River Oaks Mature Adults Club, the Iroquois Ridge Older Adults Centre and Queen Elizabeth Park Older Adults Centre. Sections covered include Administration, Facility Management, Finance and Accounting, Property and Equipment, Programs, Day Trips, Volunteers, Special Interest Clubs/Activities Guidelines, Emergency Procedures, In Memoriam, Centre Sponsorship and Promotional Material Guidelines.

The Oakville Seniors' Services Policies and Procedures does not include information found in the Articles and Bylaws, Letter of Agreement, Seniors Services Business Plan Membership Information Package or the Parks, Recreation, Culture and Library Master Plan.

A copy of the Policies & Procedures is located on site at the Oakville Seniors' Centre, the Sir John Colborne Centre, the River Oaks Mature Adults Club, Iroquois Ridge Older Adults Centre and Queen Elizabeth Park Older Adults Centre for referencing by Centre volunteers, members and staff.

## **2.0 Administration**

### **2.1 Responsibility**

The Centre Co-ordinator is responsible for the day-to-day administration of the Centre. In the absence of the Centre Co-ordinator the duties may be delegated to the Assistant Co-ordinator position and in the absence of full time staff, trained reception/greeter volunteers and staff designates.

Daily responsibilities such as answering the telephone, selling tickets and information distribution are the primary duties of the reception volunteer with support from staff.

### **2.2 Membership**

Renewal of membership is required on an annual basis, based on membership expiry date.

Members are encouraged to purchase their membership at the same Centre each year. Membership is required for all pre-registered programs, drop-in activities, subsidized special events and day trips.

Membership spot checks are held throughout the year and may be carried out by Drop-in Convenors, Centre Volunteers and Staff. Visitors who are visiting for one month, or less, are entitled to a complimentary membership to be used for drop in activities and special events. If their stay is longer than one month, they would be required to purchase a membership. Reminder letters are sent out one month after a membership has expired.

### **2.3 Program Registration**

Program registration takes place through the Town of Oakville Recreation & Culture Department. A few drop in programs, run by volunteer convenors are still registered at the Centre where the activity takes place. Members will need to consult the current Senior Services Newsletter for information regarding registration for programs.

#### **Recreation and Culture Registered Programs**

To register for Seniors Services programs you can access the IRIS (Interactive Registration Information System) system by registering on the computer or on the telephone beginning on designated IRIS registration days. An alternative way to register is to fill out an application form and hand it in to Town Hall, any Senior Centre and all Town recreation facilities. The application form is processed after the IRIS registration date. Non-residents are charged a non-resident surcharge for each program registered. (Town of Oakville Policy)

## **2.4 Refund Policy**

Membership - There is no refund of membership fees.

Programs - for program withdrawals/refunds you must call the Recreation and Culture Department. All requests for withdrawals/refunds are subject to a \$10.00 + HST administrative charge per registrant, per transaction or if the registrant chooses they can receive a credit on their account. A full refund is issued for all courses cancelled by the Recreation and Culture Department. Pro-rated refunds for course withdrawals are issued up to the business day prior to the third class. If you require a withdrawal/refund you need to let the Department know the business day prior to the third class. Refunds due to medical reasons must be accompanied by a Doctor's note. These refunds will be pro-rated and are not subject to an administration fee.

Day trips - Refer to the Day Trips 7.2 Refund Policy.

Special Events - There are no refunds given after the final ticket sale date unless tickets can be sold to someone on a waiting list. No immediate refunds will be given.

## **2.5 Non Sufficient Funds (NSF) Cheques**

NSF cheques for which a fee is charged to the Centre will be returned to the cheque issuer and the Centre shall request reimbursement for any service charges.

## **2.6 Photocopies**

Photocopies required for programs are provided by the Centre. Program/class-related photocopies are printed free of charge. A minimum of one week lead time is required for photocopy requests exceeding fifty copies (pages). Requests of 100 copies (pages) and over may be referred to another printing source. There is a fee (set by the Policy Review Board) for personal photocopies. Notification posted at photocopy machines.

## **2.7 Records**

Records and reports that contain personal information about Centre members, volunteers, staff and students are to be kept confidential, in accordance with the Town of Oakville Procedures in accordance with the Provincial Freedom of Information Act. Release of information (name, telephone, address, etc.) may be made by staff with the permission of the individual to whom it pertains. Records that contain personal information are not to be accessible to the public. Discarded records must be disposed of according to the Town of Oakville By-Law 1990-260 which outlines retention schedules for the management of the Town's records.

## **3.0 Facility Management**

### **3.1 Use of Facilities**

The Centre Co-ordinator is responsible for all scheduling and room bookings at the Senior Centres. Regular Senior Centre programming takes precedence over Centre rentals.

### **3.2 Centre Rentals**

Rentals are booked through the Centre Co-ordinator. The Senior Centres are rented only for events which are specifically for members (50 years of age and older), to groups which have at least 75% senior membership, or to non-profit groups which provide services for seniors. Senior Centre members must be in good standing in order to rent a room for private functions. (Refer to the Recreation and Culture Department's Senior Centres' Rental Policy & Procedures).

### **3.3 Rental Fees**

Rental fees are set by the Town of Oakville and are categorized as follows:

- Not Licensed - Afternoon
- Evening
- Licensed - (Liquor, Wine, Beer)
- Non-Profit Group Meetings

The lessee is responsible for room set-up and clean-up and must pay a refundable deposit of \$150. In addition for rentals at the Oakville Seniors' Centre and the Colborne Centre the lessee also pays an honorarium (\$12.50 /hour) to the on site staff designate. There are also fees required for liability insurance either licensed or not licensed as well as fees payable to SOCAN, the music licensing body. Fees are subject to change and are provided by the Recreation and Culture Booking Clerk.

### **3.4 Staff Designates**

Staff designates are trained Centre volunteers who are on site during non-staffed hours. Non-staffed hours are defined by the hours not regularly worked by the paid, full-time staff of the Centres.

All licensed functions must have a staff member or designate who must be Smart Served trained (ratio of 1 trained staff member per 100 guests). Refer to the Centres' Designate Manual located at the Oakville Senior Centre and the Colborne Centre only.

### **3.5 Accident/Incident**

Any accident or incident must be reported to Centre staff immediately. If the accident/incident occurred during non-staffed hours and is of a serious nature (i.e. ambulance, fire or police are called 9 -911), staff must be contacted at home. (Staff home phone numbers are listed in the Designate Training Manuals). If the accident/incident is of a non-serious nature they it must be reported to staff by the next business day following the event.

### **3.6 Parking**

The number of parking spaces at the Centres is limited. Spaces are allocated on a first-come, first-served basis. Handicapped parking spaces are provided as per the Town of Oakville requirements. There is no overnight parking allowed in any Centre parking lot.

### **3.7 Smoking**

Oakville Seniors' Centres are smoke-free buildings (Municipal By-law No. 2001-218 and the Smoke Free Ontario Act May 2006) and no smoking is allowed within the facilities. Specific areas outside of the buildings have been equipped with benches and ashtrays for the convenience of smokers.

### **3.8 Display Cabinet**

Centre display cabinets are to be used for displaying items for Centre promotion and/or fundraising. Personal items are not displayed or sold for personal gain.

### **3.9 Display of Paintings or Wall Hangings**

Paintings and/or wall hangings submitted for display must first be approved by the Centre Property Committee.

### **3.10 Scents**

Although the centres are not “scent- free” members are encouraged to forgo scent while attending the centres.

## **4.0 Finance and Accounting**

### **4.1 Responsibility**

Funds generated through the Centre activities are under the control of each Centre's Operations Board, Executive and Advisory Committee (hereinafter called Governing Boards). Requests for expenditures must first be submitted to the Finance and Purchasing Committee. The Finance and Purchasing Committee has the authority to approve expenditures up to \$500. The Finance and Purchasing Committee makes recommendations for expenditures over \$500 to the Governing Boards for final approval.

Centre Co-ordinator has the authority to disburse budgeted expenditures up to \$300 without obtaining approval from the Finance & Purchasing Committee. Approval must be obtained for expenditures over \$300.

### **4.2 Income Collection and Receipt Procedure**

Income is collected from drop-in fees, sale of transit tickets, kitchen revenue, day trips, etc. by staff and/or their designates (reception volunteers). Both staff and volunteers count and record income collected on a daily basis. Income must be balanced daily.

Receipts are issued for various Centre programs.

Municipal tax receipts are issued through the Town of Oakville for donations to the Centres, if requested by the donor. A minimum donation of \$20 is required for a receipt.

### **4.3 Banking Procedures**

The selection of a financial institution is recommended by the Treasurer to the Governing Boards. Representatives of the Governing Boards sign the banking resolution, as authorized by a motion of the Board.

Two signatures are required on cheques. One staff person and one from the principal signing officer (preferably the Treasurer) on each cheque. The Board Chairperson, Assistant Treasurer and Board Secretary will serve as alternate signing officers. In the Co-ordinators absence, an alternate staff person will be designated to sign cheques.

Cheques are to be issued at regular intervals and are not to be pre-signed by any signing officers. The only bank accounts that are official and recognized are those that are established under the official Centres' names.

### **4.4 Disbursement of Funds**

Cheques are to be issued for the payment of bills on a regular basis, or more frequently as required. Receipts or other vouchers must be attached to all cheque requisitions.



All cash disbursements are to be taken from petty cash and supported by receipts. Only staff or authorized volunteers may disburse cash from petty cash.

#### **4.5 Records to be kept**

Records shall be kept as agreed by the Treasurer and the Centre Co-ordinator. Such records shall be maintained in a systematic and professional manner so as to provide satisfactory control and permit proper review and audit. All financial records must be retained for a minimum of 7 years in accordance with generally accepted accounting procedures. (refer to Policy # 2.7)

#### **4.6 Budgetary Cycle and Process**

The fiscal year is the calendar year. The Treasurer is responsible for preparing a draft budget for review by the Finance and Purchasing Committee before the end of a calendar year. The Treasurer and the Finance and Purchasing Committee shall agree jointly on the budget to be recommended to the applicable Governing Boards. The Treasurer submits the budget to the Board for its review and approval.

The Town of Oakville's Seniors' Services budget may be reviewed by the Finance & Purchasing Committee at the Sir John Colborne Centre, the Oakville Senior Citizens' Centre, the Iroquois Ridge Older Adults Centre and the Queen Elizabeth Park Older Adults Centre on an annual basis.

#### **4.7 Financial Reports**

The Treasurer is responsible for preparing the monthly and year end financial reports for the Finance and Purchasing Committee and the Governing Boards in a format agreed in advance by the Committee and the Board. The financial report shall include a balance sheet, statements of income and expense, cumulative and comparative budgets and the bank reconciliation.

Once approved by the Governing Boards, the financial report is posted on the bulletin board for the membership to review.

#### **4.8 Investments**

The Finance and Purchasing Committee will develop a strategy for allocation of surplus funds (funds not required for current operations) based on the Investment Strategy Guidelines (Appendix A). The investment plan must be approved by the Governing Boards and reviewed annually.

#### **4.9 Insurance**

All property, including building and contents are under the care of the Town of Oakville and are covered under the Town's Insurance Policy.

Volunteers, like staff, are covered under the Town of Oakville's Liability, Omissions & Errors Insurance Policy while they are performing duties on behalf of the Centre.

The Finance and Purchasing Committee at the Colborne Centre gives direction to the Community Foundation re: Friends of the Oakville Seniors Centres Endowment Fund.

#### **4.10 Audit**

A financial audit or review engagement must be conducted on an annual basis by a professional accountant or someone with accounting experience. The report of the auditor shall be read and approved at the Annual General Meeting and shall be made available to all members.

#### **4.11 Auditor**

The auditor, on recommendation of staff and/or volunteers, should be appointed by the membership at the Annual General Meeting. The auditor may meet annually or more often if requested, with the Finance & Purchasing Committee and/or the Policy Review Board.

#### **4.12 On Line Banking**

On-line banking can be used to obtain bank statements and records only. ie. financial transactions. On line banking cannot be used to make payments/transfers as two signatures are required for these transactions.

## Appendix A

### **Investment Strategy Guidelines**

The Oakville Senior Centres must have enough funds to meet budget requirements and to allow for contingencies. The investment strategy guidelines refer to surplus operating funds. Investments will be made taking into consideration the projected needs of the organization to access surplus funds.

Policy Priorities should include:

1. Preserving Capital
2. Maintaining Liquidity
3. Maximizing Yield

#### **G.I.C.'s**

Surplus funds may be invested in G.I.C.'s. G.I.C.'s may be laddered so that they come due each year from year one to year five. Laddering G.I.C.'s takes advantage of fluctuating interest rates as the terms are staggered.

The Finance and Purchasing Committees will monitor the investment portfolio on a monthly basis.

The Investment Strategy Guidelines are to be reviewed on a yearly basis by the Finance and Purchasing Committees.

## **5.0 Property and Equipment**

### **5.1 Responsibility**

Centre staff is responsible and accountable to the Town of Oakville for the Seniors' Centres. Property Committees shall support and assist Centre staff in the ongoing planning, evaluation, repairs and maintenance of the Centres and grounds. (4.1 Letter of Agreement)

### **5.2 Equipment**

Two classes of equipment distinguished by ownership are recognized at the Centres:

|         |  |
|---------|--|
| Class 1 | Purchased by the Town of Oakville.   |
| Class 2 | Purchased collectively out of Centre funds, or donated to the Centre in the name of the Governing Board. |

The Governing Board shall be responsible for the cost of repairing and replacing Class 2 property and equipment. The Board may dispose of, as it sees fit, any of its property and equipment.

No piece of equipment belonging to the Town of Oakville or the Board shall be removed from the premises by any member without first having obtained permission from a Centre staff person. The member shall reimburse the Centre for any damage or loss. A record shall be kept of any items removed.

A bi-annual physical inventory shall be the responsibility of the Property Committee.

Insuring equipment is the responsibility of the Town of Oakville.

Equipment purchased wholly, or cost-shared, by groups within the Centres for specific purposes shall become the property of the Centre. Only with this arrangement shall items be stored or left at the Centres if there is room.

### **5.3 Maintenance**

The Property Committee conducts regular walks throughout the Centre to identify any items needing attention and reports back to the Operations Board. The Centre Co-ordinator makes arrangements for Town of Oakville staff or contractors to repair equipment. The Property Committee assists Centre staff with identifying minor/major repairs and maintenance needed in the Centre.

Cleaning of the Centres is contracted and the responsibility of the Town of Oakville.

#### **5.4 Approval of Equipment Purchases and Repairs**

The Property Committee is responsible for ensuring that Operations Board purchased equipment items are repaired. The Property Committee requires approval from the Governing Boards for items over \$500.

#### **5.5 Use of Tradespersons**

Licensed tradespersons will be called as needed into the Centre by the Centre Co-ordinator/Supervisor or staff designate. Financial responsibility i.e. either Town or Centre will depend on the item involved.

#### **5.6 Use of Volunteers**

Volunteers are limited to carrying out minor repairs and maintenance, after consultation with Centre staff.

## **6.0 Programs**

### **6.1 Responsibility**

Centre staff is responsible for the planning, evaluation, scheduling and operation of Centre programs. Centres will provide a wide variety of programs that serve the social, recreational, physical, intellectual and wellness needs of its members. Centre staff set program fees based on Council direction.

### **6.2 Types of Programs**

Registered - those programs that require pre-registration and prior fee payment.

Drop-In - those programs scheduled at a certain day and time but do not require pre-registration unless space is limited. The majority of drop-in programs require that participants pay a minimal user fee, determined by the Policy Review Board. Each time anyone participates in a drop-in program (whether it be morning, afternoon or night time) they pay the applicable drop-in fee.

Members who use the Centre on a regular basis but are not taking part in a formal drop in program are encouraged, but not required, to pay the drop in fee.

Special Events - includes socials, guest speakers, movie afternoons, fundraisers, theatre, etc. Special Events are scheduled and may require pre-registration and payment and may be restricted to members only.

Day Trips - see Day Trips Policy & Procedures Number 7.0.

### **6.3 Program Criteria**

The following criteria are to be applied prior to initiating a new program or in evaluating existing programs.

- a) Programs must earn the minimum amount of revenue to cover costs. In the event of a new program where the revenue does not cover the- costs, that program may be subsidized.
- b) There must be space to hold a program, on or off site.
- c) The types of programs offered shall be consistent with the mission/vision of the Oakville Senior Services.
- d) Scheduling of programs will consider parking limitations.
- e) For evening and weekend programs a regular staff designate must be assigned.
- f) Special Interest Group Needs (refer to section 9.0)

## **7.0 Day Trips**

### **7.1 Ticket Sales**

Tickets for Centre members are available to purchase from the Day Trip Convenors at 1:00 p.m. on the date indicated in the Newsletter or as posted on the Day Trip Board. After that time, tickets may be purchased at the front desks of the Oakville Senior Centre and the Sir John Colborne Centre.

Membership cards must be shown at the time of ticket purchase for each ticket purchased. There is a maximum of two tickets per person (a valid membership must be shown for each ticket purchased). Tickets must be purchased in person, no phone reservations for tickets are accepted.

### **7.2 Ticket Refunds**

There are no ticket refunds. Tickets are to be turned in to the Reception desk to the attention of the Travel Convenor who will attempt to re sell the ticket if possible.

### **7.3 Bus Seating**

Travel Convenors are in charge of bus seating. Priority is given to people with disabilities i.e. with walkers, canes, etc.

### **7.4 Medical Policy**

Passengers must be in a "good state of health" to participate in any day trip.

A "good state of health" constitutes:

- ability to negotiate stairs independently
- ability to use toilet facilities unassisted
- ability to self-administer medications

It is recommended that day trip passengers obtain out-of-country medical insurance if day trips cross the border to the United States. Passengers must have documentation as required for U.S. and Canada Customs and Immigration.

### **7.5 Special Diets**

Special diets may be accommodated if arrangements are made at the time of booking and only if restaurants offer this service.

### **7.6 Cancellation**

Trips will be cancelled at the cut-off date if there are insufficient paid-in-full participants. Refunds will be issued.

## **8.0 Volunteers**

### **8.1 Definition**

“Volunteers are individuals who offer their time, energy, skills and services of their own free will and for no wage or salary.” (Halton Social Planning Council and Volunteer Centre).

The contribution of volunteers is essential to the operation of the Centres. Volunteering requires a commitment to the Mission/Vision of the Oakville Senior Services and the Recreation and Culture Department.

Volunteers are not required to be Centre members, however volunteers are encouraged to become members if eligible.

### **8.2 Job Descriptions**

Job Descriptions will be in place for each volunteer position. Job descriptions will include the volunteers' responsibilities, expectations and supervisory relationships. Volunteers will be given a copy of their job description prior to placement.

### **8.3 Recruitment**

Volunteers will be recruited from the Oakville community by Centre staff and Volunteer Convenors.

Where volunteer opportunities are limited, priority will be given to members before non-members, to Oakville residents before non-residents and to older adults 50+ before younger volunteers (exception being for placement students).

### **8.4 Screening**

**Volunteer Application** - All volunteers will be required to complete a volunteer application form. The form is designed to provide the Centre with information on the volunteer's background, availability, special interests and skills.

**Volunteer Interview** - All potential volunteers will be interviewed prior to placement by Centre staff and/or Volunteer Convenors. The interview is designed to provide the volunteer with an overview of the Centre operation and information about the various volunteer opportunities available. It also allows the interviewer an opportunity to get to know the volunteer, to obtain an appreciation of the volunteer's capabilities and to determine suitability.



Reference Check - A reference check is required for Friendship Luncheon drivers only. Volunteers must show proof of a valid driver's license and give two names, non-family members for a reference check. Volunteer drivers must carry at least two million dollars in personal liability insurance and are encouraged to notify their insurance company prior to becoming a volunteer driver.

Police Checks are required for the Friendship Luncheon volunteer drivers. Centres will reimburse the applicable fee for the police check.

## **8.5 Placement**

The volunteer is placed in a position to which he/she is best suited in order to meet the needs of the Centre as well as the needs and interests of the volunteer.

## **8.6 Orientation and Training**

Every volunteer will receive an orientation prior to placement. The orientation provides new volunteers with an overview of the Centre as well as an introduction to their volunteer position. Further orientation and training occurs during the volunteer assignment at regular meetings and during formal volunteer/training sessions. (i.e. first aid, accessible customer service training)

Volunteers will be given the following pamphlets to read and must sign the acknowledgement form that indicates that they have read and understood the information included.

- 1) Accessible Customer Service Etiquette
- 2) Bill 168 Violence in the Workplace
- 3) Volunteer Informed Consent and Waiver

## **8.7 Recognition**

Volunteers must receive a sense of appreciation and reward for their contribution. This can be achieved through formal and informal recognition systems. Formal recognition events take place yearly and may include a Volunteer Reception held at the Centres.

Informal recognition occurs through the sincere appreciation and expression of thanks for the work being done by the volunteer. This type of recognition is very effective as it occurs more frequently. It is also important to recognize those staff who supervise volunteers and are supportive of them.

## **8.8 Termination**

For a number of reasons volunteers may not be able to continue with their volunteer placement. The applicable group convenor must be notified if a volunteer is no longer able to continue.

If a volunteer is not fulfilling the required role they will be asked to meet with the group convenor and staff to discuss the situation. The volunteer may be inappropriately

assigned or there may be some significant changes in their personal life that are interfering with their performance. Volunteers may be reassigned to less demanding roles or be asked to withdraw. Staff will act as arbitrators in case of conflict.

## **8.9 Evaluation**

In order to gain insight into the effectiveness of the volunteer program, volunteers may be asked to evaluate their volunteer placement or training session on an annual basis. This allows the volunteer to have input regarding their placement and offer suggestions for improvement or to change to a different volunteer assignment.

## **8.10 Recording of Volunteer Hours**

Volunteer's hours are tracked and recorded. These statistics provide the Centres and the Department of Recreation and Culture with valuable information about total volunteer hours.

## **8.11 Confidentiality**

Volunteers may have access to confidential information by reason of their volunteering with the Centres. Volunteers must not make such information available to other Senior Centre members or to the general public. When volunteers are unsure of the status of information, they shall discuss such information with staff, before making any release.

## **8.12 Insurance Coverage**

Liability - All volunteers acting on behalf of, or performing job functions for, the Town of Oakville Recreation and Culture Department are covered for legal liability.

Personal Injury - The Corporation of the Town of Oakville does not carry health care coverage for volunteers who experience personal injury or illness while at the centres. Injuries received travelling to and from the Centres are not covered by Town insurance policies.

Loss of Personal Property - Theft, breakage and vandalism of volunteers' property are not covered by the Town of Oakville's insurance policies. Volunteers are reminded that proper precautions should be taken to protect personal belongings while at the Centres.

## **8.13 Gas Reimbursement**

Friendship Luncheon volunteer drivers receive a gas coupon to assist with the cost of gas.

## **9.0 Special Interest Clubs/Activities (hereinafter called “Group”) Guidelines**

### **9.1 Executive/Governance**

Any Group within the Centre may have an elected executive. This practise is acceptable and encouraged.

If an elected executive exists, the following procedure must be followed:

- 9.1 a Terms of Reference are to be developed (to be presented to the applicable Governing Boards first for review then to the Policy Review Board for approval), including;
- purpose
  - composition
  - method of election
  - tenure
  - schedule of meetings, including Group Annual General Meeting
  - quorum
  - handling of finances
  - responsibilities
  - reporting structure
- 9.1 b Rules and Regulations are to be developed and presented to the applicable Governing Board, first for review, then to the Policy Review Board for approval. The specific rules for the Group must reflect the Centres’ purpose and Oakville Seniors Centres Articles and By-Laws.
- 9.1 c Year-end written reports, including financial statements, are to be submitted to the Governing Boards in the Centre in which they are housed. Verbal updates on Group activities are encouraged.

### **9.2 Group Membership**

- Centre Groups cannot charge a separate membership fee.
- Membership is open to any eligible Centre member who has paid the annual Senior Services membership fee.
- Attendance records will be kept for all Group meetings.

### **9.3 Club Finances**

- The only bank accounts that are official and recognized are those that are established under the official Centres’ name.
- If Groups choose to have their own bank accounts, financial statements must be submitted annually, in January, to the applicable Finance and Purchasing Committee. These bank accounts, must be held in a name other than the Seniors’ Centre and they are not protected in any way by the Centre.

#### **9.4 Drop-In Fees**

- A minimum drop-in fee will be determined each year by the Policy Review Board; it applies to all participants in a group when using the Centre. Drop-in fees are used for general Centre expenses, eg. program equipment maintenance, repair, replacement, liability insurance.
- Groups whose sole purpose is to generate revenue for the Centre will be exempt from drop-in fees.

#### **9.5 Equipment Purchases**

- Only equipment that is purchased by, or donated to, the Centre may be stored at the Centre, listed in the inventory, and covered by contents insurance. If Groups choose to purchase their own equipment, these items may neither be stored at the Centre nor included in inventory, nor covered by contents insurance.
- Groups may request funds from the Centre through the Finance & Purchasing Committee to purchase items or equipment or to cover the cost of other items. Such items will become the property of the Centre, including items where the cost was shared between group members and the Centre.

#### **9.6 Dissolving of Groups**

- Upon dissolution of any Group that has acquired assets, wholly or in part, purchased by the Centre, the ownership of such assets shall remain with the appropriate Governing Board (Articles & By-Laws, Article XIXc).

#### **9.7 Speakers, Instructors**

- Speakers may be scheduled by Groups after consultation with staff. Guest speakers may be advertised through the Centre Newsletter and bulletin boards and attendance is open to the Centre membership.
- The Group must cover the cost of the speaker.
- Instructors for programs are hired only by staff, but may be recommended by the members.

#### **9.8 Staff Designates**

- A staff designate must be in attendance outside regular Centre hours (eg. evenings and weekends).

## **9.9 Membership in Other Organizations**

The Policy Review Board has currently set fees for drop-in activities at \$0.50 per visit. Individual groups within the Centres collect these fees and pass them on to the Centre where the activity takes place. Extra fees, over and above the drop-in fees, are to reflect extra costs related to senior centre activities only.

Examples include:

- Re-imbursement for the cost of gasoline or entry fees when the group travels off-site
- Extra costs incurred for speakers, workshops, etc.
- Monetary prizes for card and/or bingo games, etc.
- Refreshments when included in weekly fees, i.e. social dancing group
- Annual celebrations of any type, i.e. Christmas party, yearly wrap up party, etc.
- Any other requests for extra money to support organizations or causes, etc. should be considered as an optional donation only, not a mandatory fee for any activity sponsored by the senior centres.

## **9.10 Refreshments**

- If Groups are meeting in the evenings or weekends and using the kitchen supplies, they will pay the current fee.

## **9.11 Publicity and Promotion**

- Only Groups operating under the auspices of the Centres are entitled to advertise, at no charge in the Centres' Newsletter, or participate in Open Houses.
- All media releases/advisories issued by Centre Groups must first be pre-approved by Centre staff who will then forward them on to the Town of Oakville Corporate Communications Department who send them to the media.

## **10.0 Emergency Procedures**

### **10.1 Emergency Situations**

An emergency situation may constitute one of the following:

- a) Fire - any evidence of fire, smoke or the ringing of the fire alarm.
- b) Medical - any type of injury/disability requiring assistance.
- c) Violence - physical or verbal threats or inappropriate language.

### **10.2 Fire Emergency**

All volunteers should be made aware of the Centres' Fire Safety Plan. In the event of a fire emergency;

- staff/volunteers will contact the Fire Department (9) 911.
- staff/volunteers will direct patrons to the closest emergency exit (away from the location of the suspected fire).

### **10.3 Medical Emergency**

In the event of a medical emergency staff (or volunteer in staff absence) should be called to assess the situation.

If the emergency is of a minor nature it can be dealt with at the Centre by staff/volunteer. If the emergency is of a serious nature the staff/volunteer will phone (9) 911 for an ambulance. When phoning (9) 911 you must tell the operator the correct address of the Centre as the Centres are on the main Town telephone line and a call display will indicate that you are calling from Town Hall and that is where the ambulance would otherwise go.

Note for the Community Recreation Centres you phone 911 to access emergency services or first consult with Community Centre staff.

### **10.4 Violence**

In the event of the threat of violence, staff/volunteer should be called to assess the situation. Police may be called if the situation escalates. Non-emergency Halton Regional Police phone number (9) 905-878-5511. Emergency phone number (9) 911.

The Town of Oakville Rzone policy is in effect at all Centres. The Rzone is a zero tolerance operating procedure for the Town's Department of Recreation and Culture and Parks and Open Space and is intended to improve the safety and leisure environment in all Oakville's recreation and cultural facilities.

### **10.5 Volunteer Training**

Volunteers are to be trained annually in the procedures to follow in the event of an emergency. Written procedures must be readily accessible to all volunteers.

### **10.6 Equipment**

Centres must be equipped with adequate supplies and equipment for emergencies (i.e. First Aid Kit, Automated External Defibrillators (AED), Wheelchair)

### **10.7 Injury Reports**

All accidents and injuries must be reported to staff who are required to complete a General Personal Injury Report.

### **10.8 Phone Identification**

It is recommended that the following information be posted on each Centre phone:

- Emergency (9) 911
- name and address of Centre
- closest intersection

### **10.9 Lock Down Procedures**

A Lock Down is a plan to secure all areas of the facility and to restrict the movement of any persons into, out of, and around the building. The goal is to ensure that all staff and members of the public are out of harm's way and are able to remain in a safe and secure area until the threat of harm has passed.

A Lock Down is called when:

- There is an intruder in or around the facility.
- Halton Regional Police advise that there are predators in the area.
- Town of Oakville senior management advise that we are in a lock down situation.

Lockdown procedures are located in each of the Seniors Centre.

## **11.0 In Memoriam**

### **11.1 Monetary Bequests/Donations**

Donations can be made to the Seniors' Centres by, or on behalf of, members who have passed away. Municipal tax receipts will be issued for donations of \$20 or more, if requested by the donor.

### **11.2 Property Bequests/Donations**

If a group, individual or family member wishes to honour the memory of a loved one they may purchase a piece of equipment/furnishings, etc. in their loved ones name. A wish list (including items and cost) is available from the Property Committee/Operations Board of the applicable Centre. Donations of items are not normally accepted without prior approval.

Once an item is purchased by the sponsor, a small plaque may be ordered to be placed on the item.

## **12.0 Centre Sponsorship**

This procedure establishes operational guidelines for sponsorship at the Oakville Senior Services Centres. Sponsorship is defined as a mutually beneficial business arrangement or partnership between the Seniors Centres and an external party wherein the external party contributes funds, goods, or services in return for recognition or other promotional consideration. (Town of Oakville Corporate Sponsorship Policy.)

### **12.1 Newsletter Advertising**

Oakville Seniors Services publishes the Oakville Seniors Services Newsletter twice per year and advertising is accepted in both issues. (refer to the Newsletter Advertising Procedure MS-Rec - 001-30-SS.)

### **12.2 Newsletter Articles**

Articles submitted for not-for-profit groups are accepted on a first come first served basis for publication in the newsletter. Articles are not to exceed one half page and may be edited. Placement and acceptance of article are at the discretion of the Seniors Services section of the Recreation and Culture Department.

### **12.3 Special Event/Program Sponsorship**

Each Centre has the opportunity to have sponsors for programs (registered, drop in, workshops, conferences, etc.) and special events (lunch speakers, socials, dances, card parties, etc.) as long



as they are Centre initiated. The Centre has the option to decline unsolicited donations (regardless if the sponsor is a newsletter advertiser) for special events and programs.

All sponsorship arrangements must be confirmed in writing outlining the benefits, roles and responsibilities, fees, duration and other agreed terms of the sponsorship arrangement. The sponsorship arrangement only applies to the specific event or program as agreed on and will cease once that event or program is completed.

#### **12.4 Promotional (Placement) Items**

Promotional items such as gifts, candies, etc will not be accepted from for-profit businesses unless during a sponsored event.

#### **12.5 Direct Sales**

No events may be held at the Oakville Seniors' Centres where direct sales/personal fundraising events are involved. Centre sponsored events are exempt.

### **13.0 Promotional Material Guidelines**

Oakville Seniors Services provides limited display space for informational bulletins, posters and brochures covering primarily local and regional information. Featured are publications that pertain to senior's issues, education, community events, leisure and recreational pursuits, the visual and performing arts, and information about services supported by government, community or volunteer organizations, in the following areas: health, housing assistance, social services and income support.

Inclusion of materials on bulletin boards and pamphlet display areas does not mean that the contents are in any way condoned, endorsed or recommended by the Senior Centres.

All material becomes the property of the Senior Centres. The Centres are not responsible for returning material submitted for posting to its originators. The Centres reserve the right to dispose of the material as they see fit.

Exceptions to the policy are at the discretion of the staff and/or designated volunteers.

#### **13.1 Articles Suitable for Posting on Bulletin Boards or Pamphlet Displays**

Items produced by the

- Senior Centres
- Recreation and Culture Department
- Town of Oakville
- Government agencies
- Non Profit organizations pertaining to seniors

#### **13.2 Materials Not Acceptable for Posting or Distribution**

- Retail or wholesale advertisements and private notices
- Material which contravenes the Human Rights Code, the Charter of Rights, the Criminal Code of Canada, and City of Oakville Bylaw #1984-134 and any subsequent legislation;
- Materials regarding solicitation, such as petitions, recruitment literature,

fundraising, other than those approved by the Senior Centre staff

- Material which omits essential information such as date, time, place, sponsor or fee;
- Materials with unacceptable standards of legibility, neatness, spelling, as determined by the Senior Centres
- For-Profit sector items with the exception of
  - those who are renting the Centre (posters are allowed one week prior to rental)
  - those who are advertising in the current edition of the newsletter

### **13.3 Display Guidelines**

- Items to be displayed must be left at the Reception Desk/Room of each Centre.
- Signs will be posted in all designated display areas.
- Materials deposited or posted in any display area, without following the established procedures, will be discarded.
- The length of time that materials are displayed is subject to demand and space availability.
- Advertising in the Seniors Services Newsletter allows the advertiser to display 1 poster (8 1/2 x 11) (maximum size) on a designated bulletin board at each of the Seniors Centres for the duration of the Newsletter edition in which the advertisement is published.

### **13.4 Staff/Volunteer Procedures**

- Date stamp materials to show that it has been approved. Post approved items on the bulletin board.
- Remove and discard unauthorized items.
- Maintain bulletin boards and display areas as frequently as time permits.