



Convergent Volunteer Management Plan



CONVERGENT VOLUNTEER MANAGEMENT PLAN

This material is protected by copyright and is the exclusive property of Trans Mountain Corporation and its affiliates. No external distribution or transmission of this material is permitted without the prior written consent of Trans Mountain Corporation.

To apply for the copyright holder's written permission to reproduce any part of this publication, or to receive a hardcopy of this document, a written submission should be made to the Emergency Management Department at Trans Mountain Corporation 2700-300, 5 Avenue SW, Calgary, AB T2P 5J2 or by email to Emergency_Management@transmountain.com.

Trans Mountain Corporation assumes no responsibility for errors or omissions in this document or for direct, incidental, or consequential losses or damages that may result from the external use or duplication of this material. This document is uncontrolled when downloaded or printed from the company website. Before using this material, verify that this is the most current version of the document.

This document will be updated from time to time. If you wish to receive notification of updates, please send an email to Emergency_Management@transmountain.com requesting to be notified when a new version of the document is available online. Manual holders, as indicated on the distribution list, will receive updates automatically as required.

Table of Contents

PLAN MAINTENANCE	III
RESPONSIBILITY	III
PLAN REVISIONS.....	III
REVISIONS AFTER RELEASE OR EXERCISE	III
CHANGES IN OPERATING CONDITIONS	III
REVISION REQUEST FORM	IV
CONTROL SHEET	V
1.0 INTRODUCTION	1
1.1 SCOPE.....	1
1.2 OBJECTIVES.....	1
1.3 IMPLEMENTATION OF THE CVMP	1
1.4 CONVERGENT VOLUNTEER GUIDELINES AND PRACTICES.....	2
2.0 CONVERGENT VOLUNTEER MANAGEMENT STRATEGY	2
2.1 SITUATION ASSESSMENT	2
2.2 ACTIVATING THE CONVERGENT VOLUNTEER COORDINATION LEADER	2
2.3 CONVERGENT VOLUNTEER MANAGEMENT	2
3.0 ROLES & RESPONSIBILITIES	3
3.1 LIAISON OFFICER	3
3.2 CONVERGENT VOLUNTEER COORDINATION LEADER.....	3
3.2.1 <i>Indigenous Convergent Volunteer Coordinator</i>	3
3.3 CONVERGENT VOLUNTEER COORDINATION UNIT.....	3
4.0 ACTIVATING & SETTING UP THE VOLUNTEER COORDINATION CENTRE	4
4.1 ACTIVATING THE VOLUNTEER COORDINATION CENTRE (VCC)	4
4.2 SET-UP OF THE VOLUNTEER COORDINATION CENTRE	4
5.0 CONVERGENT VOLUNTEER COORDINATION	5
5.1 VOLUNTEER ROLES.....	5
5.2 VOLUNTEER REGISTRATION AND SCREENING	5
5.3 ACCREDITATION	5
5.4 ORIENTATION & TRAINING	5
5.5 SUPPORT & SUPERVISION	6
5.6 TRANSFER OR DEMOBILIZATION OF CONVERGENT VOLUNTEERS.....	6
5.7 VOLUNTEER FEEDBACK AND EVALUATION	6
6.0 DEACTIVATION	6
7.0 RECORDS AND RECORD MAINTENANCE	6

APPENDIX A – DEFINITIONS AND ACRONYMS 7
APPENDIX B – MANAGEMENT STRUCTURE..... 8

Plan Maintenance

Responsibility

The accountability for the Convergent Volunteer Management Plan (CVMP) development and maintenance is by the Trans Mountain Manager, Emergency Management. This accountability is such:

- The document is owned by the Emergency Management Program as a supplemental plan to the Emergency Response Plan (ERP), however it is developed and maintained in cooperation with the incident specific Convergent Volunteer management plan during an emergency, if applicable.
- The administrative management for the CVMP will be administered by the Emergency Management Program.

Plan Revisions

All requests for change must be made through the Manager, Emergency Management using the Revision Request Form located in this section of the manual.

Revisions after Release or Exercise

In the event that Trans Mountain experiences a release (worst case or otherwise) or conducts an exercise or training session, the effectiveness of the ERP and applicable supplemental plans will be evaluated and updated as necessary.

Changes in Operating Conditions

If a new or different operating condition develops, or if new information which would substantially affect the implementation of the ERP and its supplemental plans is identified, then Trans Mountain will modify these to impacted Plans to address such changes.

Revision Request Form

Requested by:	Date:
Dept/ Agency:	Phone No.:
Revision Type: ___ Addition ___ Deletion ___ Correction	
Manual Section:	Page:
Revision (attach separate sheet if necessary):	
Signature of Requestor:	
Send to: Manager, Emergency Management Trans Mountain 2700-300 - 5 th Avenue S.W. Calgary, AB T2P 5J2 Canada Email: emergency_management@transmountain.com	

To be completed by Manager, Emergency Management	
Date Received:	Comments:
Date Reviewed:	
Issued as Revision: Y/ N	
If No, reason for Rejection:	
Signature Manager, Emergency Management	

Control Sheet

Revision Number	Date of Revision	Change(s)	Approval
1	May 2017	New Plan Issued	K. Malinoski
2	April 2018	Annual Review of Plan Completed	K. Malinoski
3	October 2018	Rebranding from Kinder Morgan to Trans Mountain	K. Malinoski
4	December 2020	Updates to Sections 1.0 Introduction, 2.0 Convergent Volunteer Guidelines and Practices, Section 3.0 Roles and Responsibilities. Addition of Section 4.0 Convergent Volunteer Management Strategy, Section 5.0 Communication, Section 6.0 Deactivation, and Section 7.9 Records and Record Maintenance.	K. McLernon
5	May 2022	Title Convergent Volunteer Coordination Lead revised to Leader throughout Update to Section 4.2 Appendix B diagram revised	K. McLernon
6	April 2025	Biennial Update	R. Wade
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

1.0 INTRODUCTION

During an emergency it is possible that members of the public will converge on an incident scene with the intention of supporting emergency response and restoration efforts. Although Trans Mountain does not request volunteer assistance, where there is a strong interest demonstrated by the community, Trans Mountain aims to support and incorporate Convergent Volunteers, where safe and as appropriate.

The Convergent Volunteer Management Plan (CVMP) is activated when deemed necessary by the Incident Commander under Unified Command and remains active until the development of the incident specific Convergent Volunteer management plan. The incident specific Convergent Volunteer management plan evolves from the CVMP and will be scaled according to the scope of the incident.

The CVMP will function as a “living document” in which information collected will be used to update the plan and monitor its effectiveness to achieve the objectives, as laid out in the Incident Action Plan (IAP).

1.1 Scope

The CVMP is considered a subset of Trans Mountain’s Emergency Response Plan (ERP) and has been developed to align with the Incident Command System (ICS). See Appendix B for the *Convergent Volunteer Management Structure*.

Within this plan, the term Convergent Volunteer refers to walk-in volunteers, unaffiliated volunteers, and drop-in volunteers.

Trans Mountain is responsible for the selection, deployment, and management of Convergent Volunteers and does not depend on external agencies. However, Trans Mountain will coordinate and work with appropriate external entities, as necessary.

1.2 Objectives

The objectives of the CVMP are to:

- Identify parameters for activation of the Volunteer Coordination Centre (VCC)
- Define the roles and responsibilities of the Convergent Volunteer Coordination (CVC) Unit
- Facilitate development and implementation of the incident specific Convergent Volunteer management plan to guide safe and effective coordination and management of Convergent Volunteers

1.3 Implementation of the CVMP

Activation of the Trans Mountain ERP will occur when an emergency is declared. When an emergency is declared and there is significant public interest, the CVMP will be activated, and the CVC Unit will be mobilized.

The CVMP will be used in conjunction with other appropriate plans for the response and/or remediation phase of the incident until the incident specific Convergent Volunteer management plan is developed. These plans will be used during the transition from a response phase to the remediation phase as determined by Unified Command. Implementation of the CVMP is a function of Liaison Office.

1.4 Convergent Volunteer Guidelines and Practices

Trans Mountain has developed this Plan in alignment with Canadian and international guidelines, standards, and best practices for Convergent Volunteer management, including:

- Canadian Code for Volunteer Involvement (Volunteer Canada, 2017)
- Volunteer Canada's 10 Steps of Screening (Volunteer Canada, 2012)
- Best Practice Guideline for Screening Volunteers (Public Safety Canada, 2008)
- Managing Walk-in Disaster Volunteers (JIBC, 2015)
- Spontaneous Volunteers: Community Participation in Disaster Response and Recovery (Conference Board of Canada, 2016)
- Universal Declaration on Volunteering (International Association for Volunteer Efforts, adapted at the 16th World Volunteer Conference in Amsterdam, 2001)

2.0 CONVERGENT VOLUNTEER MANAGEMENT STRATEGY

2.1 Situation Assessment

The Liaison Office will monitor and assess external requests for Convergent volunteerism. Should the need arrive, an initial assessment will be completed by the Liaison Officer in coordination with Unified Command and Safety Officer, to determine whether Convergent Volunteers could be safely utilized to support the response and restoration. The Liaison Office will develop an incident specific Convergent Volunteer management plan to present to Unified Command.

Based on the situation assessment, Unified Command will make the decision to:

- Activate the CVMP
- Request the assembly of a CVC Unit
- Confirm the parameters and roles of Convergent Volunteers as identified in the incident specific Convergent Volunteer management plan

2.2 Activating the Convergent Volunteer Coordination Leader

The Liaison Officer will assign a CVC Leader. The assigned CVC Leader shall be a member of Trans Mountain and will work with the designated CVC Unit to support Convergent Volunteer involvement.

2.3 Convergent Volunteer Management

The Liaison Officer and the CVC Leader will determine the appropriate systems¹ for Convergent Volunteer management.

Each applicable system will be set up, managed, monitored, and maintained by the CVC Leader or designate for the duration of the response.

¹ The methods and procedures used to manage Convergent Volunteers.

3.0 ROLES & RESPONSIBILITIES

The CVC Leader and the CVC Unit are responsible for carrying out the specific duties under the CVMP.

3.1 Liaison Officer

The Liaison Officer is responsible for receiving and monitoring requests from persons and/or entities interested in Convergent Volunteer roles and presenting this information to Unified Command. The Liaison Officer is responsible for the development of the incident specific Convergent Volunteer management plan and oversees the CVC Unit.

For role specific duties, refer to the *Trans Mountain ICS Guide*.

3.2 Convergent Volunteer Coordination Leader

The CVC Leader is responsible for:

- Reporting to the Liaison Officer
- Overseeing the CVC Unit
- Implementing and updating the incident specific Convergent Volunteer management plan
- Initiating tools and systems to manage Convergent Volunteers
- Ensuring that organizational Convergent Volunteer management processes are consistently applied
- Liaising with the ICP – Operations and Planning Sections to determine needs of the response
- Overseeing VCC set-up and management
- Maintaining communication with external entities
- Ordering the demobilization of incident resources, when appropriate

3.2.1 Indigenous Convergent Volunteer Coordinator

The Indigenous Convergent Volunteer Coordinator will work with the CVC Leader to support Indigenous involvement and is responsible for:

- Establishing and maintaining communication with Indigenous communities interested in Convergent Volunteer roles
- Providing updates to the ICP - Liaison Indigenous Coordinator
- Maintaining contact lists of Indigenous communities interested in Convergent Volunteer roles

3.3 Convergent Volunteer Coordination Unit

The CVC Unit will work under the leadership of the CVC Leader and with the appropriate ICP Sections to carry out Convergent Volunteer management functions and is responsible for:

- Implementing the incident specific Convergent Volunteer management plan
- Setting up the VCC
- Ensuring all operational functions at the VCC are carried out
- Coordinating the provision of facilities, services, and materials to open and operate the VCC
- Identifying training and safety requirements for each identified Convergent Volunteer role

- Overseeing and/or conducting the accreditation process, including registration and screening, and orientation and training, and Convergent Volunteer identification
- Managing the logistics of deployment and demobilization of Convergent Volunteers
- Supervising Convergent Volunteers
- Documenting key actions taken by CVC Unit
- Collating and assessing Convergent Volunteer feedback and evaluation
- Maintaining accurate, up-to-date files including check-in logs, situation status reports, communication logs, training logs, and Convergent Volunteer identification

4.0 ACTIVATING & SETTING UP THE VOLUNTEER COORDINATION CENTRE

4.1 Activating the Volunteer Coordination Centre (VCC)

The VCC is the central location for the accreditation (see Section 5.3) of Convergent Volunteers and will be established at a location separate from the incident site and ICP.

Rationale for activating the VCC will vary based on the scope of the incident. Reasons may include but are not limited to:

- High interest to support response and restoration efforts
- To act as a base or point-of-contact for Convergent Volunteers presenting at the response site

The VCC will be the primary location to:

- Accept applications
- Initiate the accreditation process
- Provide information, resources, and training for volunteers

4.2 Set-Up of the Volunteer Coordination Centre

The CVC Unit will work with the ICP - Logistics Section to determine the location of the VCC and other logistical requirements. The set-up and operation of the VCC may also be coordinated with the affected community (municipal, regional, or Indigenous), and/or non-government organization (NGO), as appropriate.

The following considerations will be taken when determining the location of the VCC:

- Proximity to the focus of activity without interfering with site and/or ICP
- Estimated number of Convergent Volunteers expected
- Types of Convergent Volunteer assignments
- Logistical considerations (parking, security, accessibility, adequate space, functionality, etc.)

The CVC Leader will ensure functional setup and will oversee appropriate personnel, supplies, and equipment are in place.

5.0 CONVERGENT VOLUNTEER COORDINATION

5.1 Volunteer Roles

Trans Mountain's Convergent Volunteer roles reflect the needs of the incident and are subject to change. Convergent Volunteer roles will be filled to reflect the ability and availability of the Convergent Volunteer.

The safety of Convergent Volunteers is the responsibility of the CVC Leader, in conjunction with the CVC Unit. Efforts will be made to assign volunteers to roles that require either minimal or no personal protective equipment (PPE).

For roles requiring the use of PPE, appropriate PPE will be distributed to each Convergent Volunteer.

5.2 Volunteer Registration and Screening

Convergent Volunteer registration will be conducted using the most applicable registration tools and systems.

Trans Mountain's screening process applies to all Convergent Volunteers and is guided by *Volunteer Canada's 10 Steps of Screening*², to ensure volunteers are:

- Assigned roles that are relevant and meaningful to the response
- Familiar with Trans Mountain's mandate, mission, and priorities relevant to the response
- Aware of the requirements needed to become a Convergent Volunteer
- Familiar with the skillset required for each volunteer role
- Aware of the risks and provided with PPE and Trans Mountain's Convergent Volunteer liability waiver

5.3 Accreditation

All Convergent Volunteers must be accredited prior to deployment. Accreditation shall include:

- Registration and screening
- Orientation and training
- Convergent Volunteer identification

5.4 Orientation & Training

The CVC Leader, in collaboration with Safety and the CVC Unit, will conduct an assessment to determine the appropriate orientation and training required for each identified position.

When Convergent Volunteers are assigned a role, training will be carried out to ensure Convergent Volunteers can safely and effectively complete assigned roles.

² As per Volunteer Canada's Screening Handbook (12th Edition, 2012).

Where a Convergent Volunteer returns for multiple shifts, additional orientation and training may be required.

5.5 Support & Supervision

Convergent Volunteers may require support and supervision and the CVC Unit will address concerns or questions promptly. The complexity and risk of each role will determine the level of support and supervision required.

The Convergent Volunteer's direct supervisor is responsible for ensuring that Convergent Volunteers maintain appropriate identification at all times. Convergent Volunteers presenting at any response or restoration location without undergoing accreditation will not be granted access and should be directed to the CVC Unit.

5.6 Transfer or Demobilization of Convergent Volunteers

In some circumstances, a Convergent Volunteer may need to be transferred into another role or may no longer be required to support the response. Upon transfer or demobilization of a Convergent Volunteer, the CVC Unit will ensure all PPE is returned and confirm that there have been no health and/or safety incidents. Any concerns should be brought to the attention of the CVC Leader.

5.7 Volunteer Feedback and Evaluation

Volunteer feedback should be recorded and considered in the post response evaluation.

6.0 DEACTIVATION

Convergent Volunteer management activities will continue until it has been determined by Unified Command, the Liaison Officer, and the CVC Leader that Convergent Volunteers are no longer required. Upon deactivation, the incident specific Convergent Volunteer Plan will cease, including the operation of the VCC.

7.0 RECORDS AND RECORD MAINTENANCE

All related documentation and the incident specific Convergent Volunteer management plan will be maintained per the Incident Records processes outlined in the ERP.

APPENDIX A – DEFINITIONS AND ACRONYMS

Definitions

Accreditation – The steps and processes that must be completed to qualify individuals to perform Convergent Volunteer roles.

Affiliated Volunteer³ – An individual who is affiliated with either a governmental agency or non-government organization (NGO) and who has been trained for a specific role or function in disaster relief or response.

Convergent Volunteers⁴ – Any individual who is suddenly motivated to help in a time of crisis and self-identifies to provide service and support during response, or recovery, activities. Convergent volunteers may also be referred to as *walk-in, unaffiliated, drop-in spontaneous, or emergent volunteers*.

Volunteer Coordination Centre – The central location for the accreditation of Convergent Volunteers that is established at a location separate from the incident site and ICP.

Volunteer – Any individual who freely provides their time, energy, and skills for public benefit, of their own free will, without monetary compensation.

Volunteerism – Refers to the concept of contribution of time, resources, energy and/or skills given of one's own free will, without monetary compensation.

Acronyms

CVC	Convergent Volunteer Coordination
CVMP	Convergent Volunteer Management Plan
ERP	Emergency Response Plan
IAP	Incident Action Plan
ICP	Incident Command Post
ICS	Incident Command System
JIBC	Justice Institute of British Columbia
NGO	Non-Government Organization
PPE	Personal Protective Equipment
VCC	Volunteer Coordination Centre

³ Managing Walk-in Disaster Volunteers (JIBC, 2015)

⁴ Managing Walk-in Disaster Volunteers (JIBC, 2015)

APPENDIX B – MANAGEMENT STRUCTURE

