

**Best Practices and
Recommended Policies**

**A Manual for Volunteer Programs
at State Agencies**



Compiled and Published by



In Collaboration with
The State Agency Volunteer Coordinator Forum

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This document may be downloaded at no cost and modified to meet the needs of California's state agencies and other interested parties, giving proper attribution to CaliforniaVolunteers.

**CaliforniaVolunteers
(916) 323-7646
www.CaliforniaVolunteers.org
receptionist@CaliforniaVolunteers.ca.gov**

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I. Introduction

A. Purpose

The *Manual for Volunteer Programs at State Agencies* is designed to be a generic reference document for state agencies and departments and other interested parties, who may use this document as a template and customize it to fit the needs and requirements of their own volunteer programs. It was created by CaliforniaVolunteers and the State Agency Volunteer Coordinator Forum (SAVCF) based upon existing state agency volunteer policy manuals.

B. Background

CaliforniaVolunteers is the state office led by the Secretary of Service and Volunteering that manages programs and initiatives aimed at increasing the number of Californians engaged in service and volunteering.

Formed in November 2009, the State Agency Volunteer Coordinator Forum (SAVCF) is a multi-agency body of volunteer coordinators in state government. The purpose of SAVCF is to bring training, common resources, and best-practice sharing opportunities to state employees who manage volunteers serving within state agencies. The goal of the forum is to support volunteer efforts already in place in state government and increase the impact of state-based volunteering.

CaliforniaVolunteers facilitates the forum due to its role in promoting service and volunteering throughout all sectors in the state. The forum is led by a core group of state volunteer coordinators who set its mission and focus. The *Manual for Volunteer Programs at State Agencies* was an immediate priority of the forum due to the critical need to have comprehensive, consistent best practices for volunteer management at agencies and departments throughout the state government.

C. History and Legal Authority

In 1978, with the passage of the California State Government Volunteers Act, Government Code, 3110 -3112, 3118-3119.1 and 3119.5, the Governor and the Legislature recognized the value of volunteers to state government:

Government Code §3112(a):

Since the spirit of volunteerism has long animated generations of Americans to give of their time and abilities to help others, the state would be wise to make use of volunteers in state service wherever practically possible.

This action spurred the launch of new and expansion of existing programs to increase the engagement of California residents as volunteers within state agencies:

Government Code §3112(b):

The spirit of citizen initiative and self-reliance that has prevailed throughout the United States for over the past two centuries needs to be recognized and fostered whenever possible in meeting the basic human needs in the state.

The realization that volunteers contribute greatly to the health and prosperity of the state motivated an official recognition of their involvement and a legal backing of their efforts in order to help to support volunteer endeavors:

Government Code §3112(e):

Legal and market disincentives and impediments need to be eliminated in order to establish an optimum environment for citizen initiative and volunteer action.

On September 21, President Clinton signed the National and Community Service Trust Act of 1993. This law merged two federal agencies, ACTION and the Commission on National and Community Service, creating the new Corporation for National Service. The Act also established AmeriCorps, a service program for Americans ages seventeen years and older.

The Act required the governor of each state to create and appoint a commission to administer the AmeriCorps program.

- In 1994, Governor Pete Wilson created the California state commission, originally known as the Commission on Improving Life through Service, through Executive Order W-77-94.
- In 2002, the state commission was renamed the Governor's Office on Service and Volunteering (GO SERV) by Governor Gray Davis through Executive Order D-51-02.
- In 2004, in Executive Order S-14-01, the organization was re-named the California Service Corps by Governor Arnold Schwarzenegger.

- In December 2006, Governor Schwarzenegger signed Executive Order S-24-06, renaming the organization to CaliforniaVolunteers. In this Executive Order, Governor Schwarzenegger also charged CaliforniaVolunteers with ensuring the coordination of volunteer activities related to disaster response and recovery, including necessary training, equipment, and transportation provisions.
- On February 26, 2008 Governor Schwarzenegger took first-in-the-nation action to encourage volunteering in California and to improve coordination of volunteer efforts between the state's departments and agencies by signing Executive Order S-02-08 which established a new position of Secretary of Service and Volunteering. This order also charged CaliforniaVolunteers with managing donations in times of disaster and the Governor's Mentoring Partnership.

In April, 2009 President Obama signed the Edward M. Kennedy Serve America Act into law. The Serve America Act reauthorized and expanded existing national service programs as well as created new funding streams to support service activities at the state and local levels.

D. Using this Manual

This manual is designed to assist California state agencies and departments in managing volunteer programs. Specifically, volunteer coordinators and volunteer program managers should refer to the policies and procedures stated in this manual for guidance in developing and implementing volunteer programs in departments under their jurisdiction. Departmental Operations Manuals, Departmental Administrative Manuals, and Departmental Notices generally provide additional information.

This manual should be used as a guide rather than strict policy, with the exception of areas that specifically cite government code. The sample forms included in the manual and appendices, with the exception of official state forms, are intended to be useful examples, to be referenced and adapted to varying volunteer programs as needed. Feel free to refer to these sample forms when creating new forms, however always verify internal agency/departamental policies before using any official state forms or creating new forms.

While this manual is public domain to be used for the public good, please attribute credit to CaliforniaVolunteers and the State Agency Volunteer Coordinator Forum if any part of it is utilized. Refer to the Works Cited section of the appendices for information on the sources that contributed to the development of this *Policy Manual for Volunteer Programs at State Agencies*.

II. The Volunteer

A. Defining a Volunteer

A volunteer is an individual who, of his or her own free will, and without compensation or financial gain, contributes goods or services to assist an agency in the accomplishment of its mission. Government Code, 3111 (a)

1. A volunteer serves under the direction of appropriate agency or department personnel.
2. A volunteer is not considered an employee within the legal meaning of the term and does not have the same rights as an employee.
3. While volunteers can serve in a wide variety of functions within state agencies, some specific legal definitions of volunteers include:
 - a. Government Code, 3111 (b)
Administrative volunteer: any person serving voluntarily on boards, commissions or other similar bodies with California state government.
 - b. Government Code, 3111 (c)
Direct service volunteer: any person involved in specific volunteer service that includes one-to-one relationships or assistance to recipients of government services.

B. The Value of Volunteers

Volunteers bring needed cost efficiencies, energy, enthusiasm, and willingness to help. Some of the many positive ways volunteers bring value to state agencies include:

1. Enhancing services by supplementing and broadening existing work.
2. Developing a group of strong supporters.
3. Bringing community connections and personal networks to agencies/departments.
4. Offering specialized skills.
5. Encouraging increased diversity by providing opportunities to involve the:
 - a. differently-abled,
 - b. members of underprivileged communities,
 - c. people of varied age groups and
 - d. other under-represented populations.
6. Bringing new energy and ideas.
7. Giving more of their time than often originally planned, due to their genuine interest in an agency/department.
8. Contributing tangible economic value, not in the form of financial donations, but in time and service. According to the annual Volunteering in America report, **6.8 million** Californians volunteered a total of **935 million** hours in 2009, which equates to **\$19.5 billion** in service.
9. The investment of time, resources and staffing expenses in volunteers and volunteer programming, yields sizeable outcomes (Chart I, page 10)

Carla Lehn - California State Library

“Volunteering allows you to extend services to the your patrons beyond what limited staff hours would be able to accomplish alone.”

Example: California Department of Parks and Recreation

“Volunteers are integral to the overall operation of our state parks. Enabling citizens to be involved actively with... programs increases public support for state parks and helps individuals better understand management decisions. Volunteers can enhance existing programs or begin new projects at a minimal cost to taxpayers. They can provide service on a temporary basis or on long-term assignments. Volunteers often bring expertise that is not otherwise available to the department. Such volunteer efforts add to and enrich the visitor’s experience and are of personal value to the volunteers themselves.”

NOTE:

When creating a policy manual, it is crucial to emphasize the value of volunteers. Customize this section according to individual agency/department needs.

BEST PRACTICES AND RECOMMENDED POLICIES

A MANUAL FOR VOLUNTEER PROGRAMS AT STATE AGENCIES

CHART I - The Value of Volunteers

| Agency/ Department | Staff and Other Resources Required | Number of Vols/ Year | Number of Hours/Year | Approximate Value/Year* | Outcomes |
|--|--|----------------------------|-------------------------|----------------------------|--|
| California Department of Parks and Recreation | <ul style="list-style-type: none"> - Statewide Vol Coord - 25 District Vol Coords - 900 DPR staff - Recruitment - Materials - Training | 24,000 | 1,087,486 | \$22,700,000 | <ul style="list-style-type: none"> - Public education & information - Cultural resource management - Natural resource management - Campground operations |
| California** Highway Patrol | <ul style="list-style-type: none"> - Training - Supervision - Space - Materials | 800 | 150,000 | \$3,500,000 | <ul style="list-style-type: none"> - Volunteers contribute highly relevant skills and life experience. - Volunteers are an invaluable resource to the department and the community at public events and as role models. - The program offers motivated seniors an opportunity to make a significant contribution, and have it acknowledged and respected. - Volunteers improve the efficiency and productivity of the Area Command. |
| Department of Water Resources | <ul style="list-style-type: none"> - Office space - Computer - Phone - Email - Training - Supervision, - Field Safety equipment | 30 | 60,000 | \$1,380,000 | <ul style="list-style-type: none"> - Helps the department to run more efficiently, allowing staff more time to devote to other assignments. - Provides valuable experience for volunteers, as well as possible future employment. - Volunteers are a great resource to the Department in public relations, for example, Tribal Liaisons. - Volunteers bring additional knowledge and experience to their work, which helps the Department learn from its volunteers on ways to continually improve itself. |
| California Library Literacy Services (an adult literacy program of the CA State Library) | <ul style="list-style-type: none"> - Local staffing - Space - Materials | 12,000 | 757,000 | \$15,900,000 | <ul style="list-style-type: none"> - 71% of adult learners who set a goal to share a book with their child achieved it. - 59% who set the goal were able to complete a job application; 47% write a resume; 49% interviewed for a job; and 28% actually secured a new job or were promoted at work. - 53% who set the goal learned to use a computer keyboard - 53% who set the goal were able to vote - 42% who set the goal became volunteers in their community |

* based on estimated volunteer hourly value (\$20.85/hr), from the Independent Sector. California may be higher.

** based on 2011 volunteer hourly value (\$23.42)

C. Volunteer Roles

People volunteer for a variety of personal and professional reasons, such as:

1. Commitment to a cause
2. The opportunity to give back to the community
3. To learn new skills and gain experience
4. To share existing skills and experience
5. To socially interact with newly acquired friends

To be able to create effective matches of volunteers to available positions begins with noting the reasons that potential volunteers want to serve while identifying the agency/departments' needs are.

Volunteers can perform a variety of duties that assist staff and enhance services. It is the responsibility of the agency/department personnel to identify the most relevant and helpful roles for volunteers. Examples of volunteer roles and activities offered by some state agencies and departments, (Chart II. Page 12.)

D. Specialized Volunteer Programs

Specialized volunteer programs generally require formal training and/or a specific time commitment from the prospective volunteer. Examples of specialized volunteers include:

1. Pro bono volunteers from corporations or other organizations Volunteers who own and are trained on specific equipment
2. Skilled volunteers, using specialized knowledge and abilities they possess
3. Student interns
4. Senior/retired volunteers

BEST PRACTICES AND RECOMMENDED POLICIES

A MANUAL FOR VOLUNTEER PROGRAMS AT STATE AGENCIES

CHART II - Specialized Volunteer Programs

| State Agency/Department | Volunteer Role | Activities |
|---|---|--|
| Department of Water Resources | Chief Counsel Assistant | Assist attorneys with research, analysis, and evaluation of data. |
| Department of Water Resources | Office Assistant | Perform various office and administrative services. |
| Department of Water Resources | Engineering Assistant | Assist with engineering analysis, field surveys, investigation, and work with various biologists, scientists, and hydrologists. |
| Department of Water Resources | California Water Plan Update Advisory Committee and Tribal Communications Committee | This committee includes volunteers who assist with the publishing of the California Water Plan every 5 years. |
| Department of Water Resources | Environmental Scientist Assistant | Assist with collection of fisheries data, including: netting, hauling, measuring fish, and transporting equipment. |
| Department of Water Resources | Telecommunications Assistant | Various administrative work, including: helping staff install phones, network gear and cabling, ordering supplies, and answering phones as necessary. |
| California Highway Patrol | CHP Senior Volunteer | Enhance operations to improve the efficiency and productivity of the Area Command, including: <ul style="list-style-type: none"> • Administration • Public Affairs • Volunteer duties using CHP vehicles • Volunteer duties during ride-along with a sworn officer |
| California Department of Parks and Recreation | Docent | Interpret and present historical and natural history programs to park visitors. |
| California Department of Parks and Recreation | Campground Host | Assist in campground operations. |
| California Department of Parks and Recreation | Facilities/Gardens/ Grounds/Trail Maintenance | Perform routine maintenance tasks. |
| California Department of Parks and Recreation | Trail Safety Patrol: Foot/Horse/Mountain Bike/ATV | Advise park visitors of trail safety. Provide Information and assistance. |
| California Library Literacy Services (a statewide adult literacy program) | Adult Literacy Tutor | Tutor adults in literacy skills. |

Examples: California Department of Parks and Recreation

Docents

Docents are specifically trained volunteers who interpret the cultural, natural, and recreational resources of state parks for visitors. Individuals who enroll in docent programs embark upon a rigorous course of study and training that provides a strong foundation of expertise for interpreting the varied resources of a particular park unit. To that foundation, the docent is encouraged to add his or her unique, individual approach and experiences. One of the most rewarding and challenging aspects of being a docent is the opportunity for on-going education.

Patrol Units

Several state parks offer opportunities for volunteers who own horses, mountain bikes, personal watercraft or off-highway vehicles to participate in trail safety patrols that augment regular state park ranger patrols. Patrol volunteers provide information and assistance to park visitors, and if authorized and properly trained, may provide first aid and other emergency assistance. They also help maintain trails within park units.

Examples: California Highway Patrol

With training, CHP volunteers can perform a useful function when called upon to do so, including placement of traffic cones and flares and directing traffic. Senior Volunteers can be trained as Child Safety Seat Technicians, to teach the Senior Driver Education Program, and in the operation, deployment and/or retrieving of the Department Radar Trailer.

III. Volunteer Intake

A. Registration of Volunteers

1. Registration Prior to Service

The volunteer manager or a designated department representative should register volunteers prior to having them perform service. Proper screening, interviewing, and placement of volunteers is essential to program success and required under Government Code, 3118 – 3119.1. Volunteer Applications may aid in the proper placement and recruitment of volunteers.

A sample Volunteer Application form.

2. Volunteer Service Agreement

The *Volunteer Service Agreement* is a standard document designed to apply to all volunteers and to address a number of issues including the following:

- a. Expense reimbursement policies
- b. Granting the agency/department copyright privileges to photographs taken of the volunteer while they are serving
- c. Workers' compensation policies
- d. Liability issues
- e. Intellectual property rights
- f. Volunteer Service Agreement renewal requirements and revision policies
- g. Drug and alcohol policies
- h. Termination policies
- i. Sexual harassment policies

NOTE: Additional Information can be found in the policy manual Section IV.G.

Sample Volunteer Service Agreements:

1. Volunteer Service Agreement: California Department of Water Resources
2. Volunteer Service Agreement: California State Library
3. Volunteer Service Agreement: Huntington Beach Public Library
4. Juvenile Volunteer Service Agreement: California Parks and Recreation
5. Youth/Short-Term Volunteer Service Agreement: Fresno County Public Library
6. Volunteer Service Agreement and Application: San Bernardino County
7. Group Volunteer Service Agreement: California Parks and Recreation
8. Volunteer Application: California Highway Patrol (Appendix I.B.2)

NOTE: Each agency/department should develop their own Volunteer Service Agreement form or other applicable waivers/agreements and have those forms approved by their legal department.

3. Oath of Allegiance

The California Oath of Allegiance specifies that volunteers in disaster council or emergency organizations must sign the oath. In addition, volunteers who are covered by liability insurance and/or workers' compensation insurance are also required to sign the STD 689. Furthermore, if a volunteer is to receive any reimbursement of any kind, they must first sign the Oath of Allegiance. The decision to require volunteers to automatically sign the Oath of Allegiance as part of the usual registration process is otherwise determined according to department policy. California Oath of Allegiance

NOTE: *This is an example of a more structured registration process. For examples of a less structured Registration process Chart III, page 18.*

B. Processing Confidential Information

All volunteer applicants should be afforded appropriate confidentiality protection. Confidential information is data such as a person's social security number, date of birth, driver's license or identification number, phone number, address, physical description, education, medical or other similar information that is sensitive in nature.

Personal information collected by the agency/department from volunteer applicants is subject to both the *Information Practices Act* and the *Public Records Act*. The *Information Practices Act* of 1977 (California Civil Code, sections §1798 et seq.) requires government agencies to protect the privacy of personal information maintained by state agencies. The *Public Records Act* was enacted to provide the citizens of California improved access to government records. In general, personal information is considered confidential and should be protected to the same extent as similar information contained in department personnel records for employees and job applicants, unless disclosure or other handling is required by the applicable laws. When developing confidentiality policies, refer to the California Civil Code regarding Personal Confidentiality and also identify agency/departmental-specific policy regarding handling personal information. CIVIL CODE, 1798.24 – 1798.24 b

All confidential information on volunteers should be forwarded to and retained by the designated division/district/sector personnel officer, as appropriate. Generally, only staff that normally has access to employee personnel files should be given access to a volunteer's confidential personal information. However, a volunteer coordinator who does not normally have access to personnel files may have access to a volunteer's confidential information. The designated department representative should determine the appropriate extent to which a volunteer coordinator may have access to a volunteer's confidential information in order to perform the employee's duties as volunteer coordinator.

Note: Any questions about disclosure, including *Public Records Act* requests, should be addressed to the agency/department's Legal Office.

C. Conditional Appointments During the Registration Process

Processing of health questionnaires and criminal history checks, if required, may take from two weeks to two months to complete, depending on whether “expedited” processing (usually for an extra fee) is selected. In certain cases a volunteer may begin training while awaiting final clearance.

An appropriate agency/department/unit supervisor should determine whether a prospective volunteer is granted a conditional appointment, pending formal approval of their health questionnaire and/or background checks. That supervisor should inform the volunteer that if either the Essential Functions Health Questionnaire or the background check is not approved, the volunteer’s service to the agency/department/unit will cease.

If a background check is mandatory, the designated department representative should not sign the *Volunteer Service Agreement* until the prospective volunteer’s background checks is complete.

D. Volunteer Status of Individuals

The following chart is an example of classification and registration policies utilized by one state agency. Other rules and policies may be more appropriate and functional for other departments/agencies. Final policies and practices should be approved by the appropriate agency/department personnel. The following information serves as a guideline.

BEST PRACTICES AND RECOMMENDED POLICIES

A MANUAL FOR VOLUNTEER PROGRAMS AT STATE AGENCIES

CHART III - Classification and Registration Policies Utilized by California State Agency

| Volunteer Status | Definition | Registration/Management | Additional |
|---------------------------------------|--|---|---|
| Active Volunteer | Has met the minimum requirements for active status, as determined by agency. | Designated representative registers the volunteers and approves active status. | <ul style="list-style-type: none"> Each agency sets minimum hourly work requirement to retain active status. Too few required hours may increase costs to agency. Too many may inhibit volunteer commitment. Hourly requirement also depends on the volunteer role and availability. |
| Inactive Volunteer | A previously active volunteer who has not met the minimum requirements for active status, including hours worked or training needed. | <ul style="list-style-type: none"> If return to active status is approved, all registration documents should be reviewed and updated as needed. Re-orientation or training may also be necessary. | <ul style="list-style-type: none"> Inactive volunteers do not enjoy volunteer privileges or benefits. Return to active status is not guaranteed in future. |
| Short-term Individual Adult Volunteer | <ul style="list-style-type: none"> Over 18 years of age. Works for three days or less. Usually works on one-day special events. | <ul style="list-style-type: none"> No need to sign a <i>Volunteer Service Agreement</i> or equivalent. There should be a disclaimer procedure developed as part of registration process. <p><u>Short Term Vol. Description form</u></p> | <ul style="list-style-type: none"> Workers' compensation and insurance are not provided. A disclaimer and waiver is a necessary part of the registration process. |
| Long-term Individual Adult Volunteer | <ul style="list-style-type: none"> Over 18 years of age. Makes commitment to serve over an extended period of time. | <p>Necessary:</p> <ul style="list-style-type: none"> Position Description, signed and dated by volunteer and designated department representative <i>Volunteer Service Agreement</i> (Page 14) | <p>May be necessary:</p> <ul style="list-style-type: none"> <u><i>Essential Functions Health Questionnaire</i></u> <u>Background check</u> -- determined by the type of volunteer position. <u><i>Finger Prints</i></u> -- determined by the type of volunteer position |

BEST PRACTICES AND RECOMMENDED POLICIES

A MANUAL FOR VOLUNTEER PROGRAMS AT STATE AGENCIES

CHART III - Classification and Registration Policies Utilized by California State Agency (continued)

| Volunteer Status | Definition | Registration/Management | Additional |
|-----------------------------|--|--|---|
| Emancipated Minor Volunteer | <p>Under the age of 18 years</p> <p style="text-align: center;">And</p> <p>Has entered into a valid marriage, whether or not the marriage has been dissolved</p> <p style="text-align: center;">Or</p> <p>Is on active duty with the armed forces of the United States</p> <p style="text-align: center;">Or</p> <p>Has received a declaration of emancipation pursuant to the <u>California Family Code §7122</u>.</p> | An Emancipated Minor Volunteer is registered and processed as an adult volunteer. | <u>Family Code,7002</u> |
| The Youth Volunteer | Under the age of 18, with the exception of emancipated minors | <ul style="list-style-type: none"> The district should determine minimum age requirements for specific tasks and when parent or guardian presence is required. Youths should still complete a <i>Volunteer Service Agreement</i> if they are a long-term volunteer. Page 14 The agency/department should require a <i>Parental/Guardian Permission</i> form and waiver. Page. 14. The agency/department should confirm with its legal department regarding any other required forms to allow juveniles to volunteer. (Appdx II.C3 & C4). | <ul style="list-style-type: none"> Labor law regarding juveniles does not refer directly to volunteer activities, but health and safety laws should be followed: During the school year, juveniles may work 32 hours/week: <ul style="list-style-type: none"> - 4 hours per day Sunday-Friday - 8 hours per day Saturday Potentially hazardous work is prohibited. (ex: operating a motor vehicle, working on railroad equipment, on or around machinery, or with hazardous chemicals.) |

BEST PRACTICES AND RECOMMENDED POLICIES
A MANUAL FOR VOLUNTEER PROGRAMS AT STATE AGENCIES

CHART III - Classification and Registration Policies Utilized by California State Agency (continued)

| Volunteer Status | Definition | Registration/Management | Additional |
|--|---|---|--|
| Formal organized groups | <ul style="list-style-type: none"> • Current state and federal documents of incorporation • Can provide proof of accident insurance and/or workers' compensation coverage for each of its participants • Formally organized under state and federal laws <ul style="list-style-type: none"> • Scouts • School Volunteers • Businesses • Civic Organizations • Non-Profit | <ul style="list-style-type: none"> • The group should apply using a <u>Volunteer Group Services Agreement</u>. • An agency/department representative should approve the <i>Volunteer Group Services Agreement</i>. • The group should agree to work under the supervision of a designated agency/department representative. • Individuals also should complete waivers. | <ul style="list-style-type: none"> • A roster of all participants, with names, addresses, and phone numbers should also be provided. • By signing the <i>Volunteer Group Services Agreement</i>, the group agrees to assume all responsibility for juveniles, including obtaining formal parental/guardian consent for juvenile participation in the group activity. • In addition to a signed <i>Volunteer Group Services Agreement</i>, an organized volunteer group should provide proof of insurance in compliance with the agency/department's requirements. |
| Informal groups | Do not have worker's compensation or accident insurance | | Ex: neighborhood organizations, community support groups, and other groups with common interests |
| Department employee as volunteer | Department employees may volunteer their services for work not related to their paid employment. | The department may not accept volunteer services that result in layoff or the reduction of hours or services of any existing state employee. | <p>The <u>Fair Labor Standards Act</u> prohibits state employees from participating in duties they are paid to perform within the scope of their employment, including:</p> <ul style="list-style-type: none"> • Duties specified on their job description, • Duties that would appropriately be assigned based on State Personnel Board classification specifications |
| Family Members of Departmental Employees | Family members of employees may perform volunteer services for California state agencies/departments | Department employees should not act as designated representatives in signing the <i>Volunteer Service Agreement</i> unless family member is a minor. | Refer to the agency/department's nepotism policy regarding placement of and working relationships between people with close personal relationships. |

BEST PRACTICES AND RECOMMENDED POLICIES
A MANUAL FOR VOLUNTEER PROGRAMS AT STATE AGENCIES

CHART III - Classification and Registration Policies Utilized by California State Agency (continued)

| Volunteer Status | Definition | Registration/Management | Additional |
|-------------------------------|--|--|--|
| Former Departmental Employees | | | Each agency/department should determine its own policy regarding former departmental employees. (Appendix II.A.1) |
| Unpaid Student Interns | | <ul style="list-style-type: none"> Students should be managed as volunteers. If long-term, they should be registered using the <i>Volunteer Service Agreement</i> (Page 14) and be covered under the department's workers' compensation and tort liability, subject to case review and acceptance. If under the age of 18, work permits issued by schools to students are recommended, although not required. | <p>Unpaid internships provide an opportunity for college and high school students to complement academic studies with career-related work experience.</p> <p>Supervisors of student interns are generally required to formally evaluate the work performance of students who receive course credit for volunteer work.</p> |
| Paid Student Interns | | Paid interns are managed as seasonal employees, not as volunteers. | College students whose salaries are paid by a university or an affiliated foundation are covered by workers' compensation through the entity under which they are hired, and are not considered department volunteers. |
| Court Referrals | Individuals referred by court jurisdictions. | <p>Volunteer registration documents are not authorized for use with court referrals.</p> <ul style="list-style-type: none"> Bring Court Sentence Document Bring I.D. Bring Time Sheets | <p>The assigning court authority (county or city) is considered the general employer, with the State of California being the secondary employer.</p> <p>Any contract or Memorandum of Understanding (MOU) with the assigning court should address issues of workers' compensation, tort liability and indemnity, and should be reviewed by the Legal Office prior to a court-referred individual beginning work.</p> |

IV. Risk Management

A. Workers' Compensation Insurance and Tort Liability

No work is so important that it should be undertaken in an unsafe manner that may result in injury. Besides the obvious pain and lost work time, such incidents can result in costly workers' compensation claims. Further, unsafe actions of a volunteer that result in injuries to another volunteer or visitor to the agency/department can result in tort claims filed against the volunteer and the department. Having a complete understanding of the agency/department's workers' compensation and tort liability policies is important to proper management of every volunteer program.

Specific questions regarding insurance, volunteer workers' compensation and tort liability issues should be directed to the appropriate Legal or Personnel Office.

1. Workers' Compensation

Workers' compensation insurance is state-mandated compensation provided by employers to their employees for physical injuries and other medically-related disabilities occurring within the course and scope of their duties. Although volunteers are not considered state employees, long-term volunteers can be covered under worker's compensation insurance programs depending on the agency/department's policies.

For example, at the California Department of Parks and Recreation, volunteers appropriately registered with an approved *Volunteer Service Agreement* are generally covered under the workers' compensation insurance program. Short-term volunteers (three days or fewer) waive coverage when they are registered.

To illustrate: A properly trained mountain bike patrol volunteer who falls and breaks an arm while performing his or her officially assigned duties may be covered by the department's workers' compensation program.

2. Tort Liability

Tort liability, as applied to volunteer management, is generally defined as an action by a short- or long-term volunteer that results in personal injury to another person or damage to the property of another. The agency/department's obligations regarding injury to a person or damage to property caused by the negligent or intentional acts or omissions of volunteers should be assessed by the appropriate legal staff. In some instances, depending on the circumstances of the particular situation, the department may be liable for the actions of a volunteer acting within the scope of his or her assigned duties.

Example: California Department of Parks and Recreation

If a volunteer, while performing officially assigned duties, accidentally leaves a shovel in a trail, and a visitor subsequently trips over the shovel and breaks his or her leg, the department could be liable in a lawsuit that the injured party brings against the volunteer.

B. Grievance Policy

Departments should have an information grievance/complaint process to address issues and concerns volunteers may raise with the activities they perform or interactions they have with other personnel in the department. This informal process should include a two-step process:

Step 1 – The volunteer should raise their concerns first to the supervisor or staff person who is directly overseeing his or her activities.

Step 2 – If the matter is not resolved at Step 1, or if the complaint pertains to the supervisor or staff person overseeing the activities of the volunteer, then it would be elevated to the volunteer services coordinator for the department. The coordinator would have final authority to determine how to address the grievance/complaint.

If possible, each agency/department should use the existing policy for employee grievances when handling complaints from volunteers. Such policies may include, but are not limited to:

1. Alternative Dispute Resolution
2. Open-Door Policy
3. Peer Review Committee
4. A formal two- or three-step procedure, submitted to and reviewed by staff or a grievance committee.

C. Agency/Departmental Policies

Risk management imposes constraints on certain types of volunteer work assignments. While volunteers should observe the same safety precautions as employees, volunteers should not be used in jobs considered hazardous for state employees. The following risk management policies are useful guidelines:

1. Volunteers should not perform dangerous physical activities, nor should they be assigned to duties that place them in life-threatening situations, even as observers.
2. Volunteers should not be assigned duties they do not feel comfortable completing, or do not willingly agree to perform.
3. Paid, appropriate staff should provide adequate first aid training, proper equipment and communicable disease protection to all volunteers whose job descriptions specifically include administering first aid services to visitors, department staff, or other volunteers.

D. Agency/Departmental Strategies

The reduction of on-the-job accident-related injuries to volunteers is the responsibility of all agency/department employees and volunteers. It is important to incorporate the following specific risk management strategies into volunteer programs:

1. Proper supervision: Direct supervision helps ensure that the volunteer program continues to meet their goals.
2. Ongoing training: To help ensure that all volunteers are familiar with safe work practices, initial and ongoing training is highly recommend. Additionally, advanced training should be completed, and records maintained, for volunteers involved in more specialized or potentially hazardous work, such as operating power tools.
3. Sign-in procedures: Provide adequate documentation as to when volunteers are on duty.
4. Safety equipment: Provide suitable safety equipment for each volunteer and require the proper use of the equipment.
5. Ongoing analysis: All accidents and injuries should be investigated to determine what factors, conditions or practices contributed to the incidents. Proper and timely actions should be taken to prevent or reduce the risk of reoccurrence.

E. Procedures for Reporting Accidents

Report all accidents and injuries within 48 hours of the incident, using the form *Accident Report (Other than Motor Vehicle)*. Thoroughly investigate and describe the circumstances surrounding the accident, including injured party information, property damage/loss information, and witness information.

The designated agency/department personnel officer should:

1. Submit the original document, including photos or diagrams, to:
Office of the Attorney General
Tort Unit
P. O. Box 944255
Sacramento, CA 94244-2550
2. Submit one copy to:
Office of Risk and Insurance Management (ORIM)
707 Third Street, First Floor
West Sacramento, CA 95605
3. Retain one copy for agency/department records.

The *Accident Report (Other than Motor Vehicle)* is a confidential document, and under no circumstances should information be given to anyone except authorized state officials. Refer to State Administrative Manual, Section 2400 and 2455, for detailed information on reporting an accident.

NOTE: Accident reporting procedures vary between departments/agencies, and policies should be verified. Following is a generic policy:

F. Background Checks

Each agency or department should determine its own policy regarding background checks, in accordance with applicable laws. Important points to consider when determining background check policy:

- Safety and security of children, vulnerable populations and communities
- Paperwork and processes required by local, state, and federal law
- Time and cost to the volunteer
- Who pays for Live Scans and associated fees
- Whether the volunteer can begin his/her position conditionally while paperwork is being processed

1. Requiring Background Checks

Agencies/departments whose volunteers may be working with sensitive information or vulnerable populations (youth, elderly, differently-abled, etc.) may be required to perform background checks on volunteers.

The agency/department can discover if it is required to request Live Scan background checks and/or can be authorized to request them by filling out and submitting the *Application for Authorization Pursuant to State Statue* and mailing to:

Department of Justice
Record Access and Security Program
P.O. Box 903387
Sacramento, CA 94203-3870

NOTE:

Chart III page 26, offers examples of background check requirements for various state volunteer positions. While this is not a comprehensive list, it does offer an overview of the range of necessary background checks and how they vary according to the position, the population served and the duration of the volunteer opportunity:

BEST PRACTICES AND RECOMMENDED POLICIES

A MANUAL FOR VOLUNTEER PROGRAMS AT STATE AGENCIES

Chart IV Background Check Requirements for Various State Volunteer Positions

| State Agency | Volunteer Position | Waiver | DOJ | FBI | CACI* | Firearm | DMV | Special *** |
|-------------------------------|-----------------------------|--------|-----|-----|-------|---------|-----|---|
| CHP | Senior Volunteer | X | X | X | | | X | |
| CA Parks and Recreation | Campground Host | | X | X | X | | X | |
| Water Resources | One Day Beach Clean-up | X | | | | | | |
| Department of Social Services | CASA** Volunteer | X | X | X | X | | | |
| CA Parks and Recreation | Docent leading school tours | | X | X | X | | | |
| CA Parks and Recreation | Maintenance Volunteer | | X | X | X | | X | |
| CA Parks and Recreation | Trail Safety Volunteer | | X | X | X | | X | 1 st Aid certification desirable |

*CACI: Child Abuse Central Index

**CASA: Court Appointed Special Advocate

***Teaching Credentials, Medical License, etc.

Example: California Department of Parks and Recreation

“Consistent with Departmental Notice 2001-13, Employment/Pre-Employment Criminal History Checks, (DPR 883), a criminal history background check including fingerprinting, is required prior to a volunteer performing any of the following activities:

- Volunteering as a camp host.
- Supervising or having control over minors. This is especially important for Junior Ranger programs, nature walks, museum tours, and other programs that are specifically focused toward participation by children.
- Having independent access to security systems, warehouses, master keys, locked offices, shops, interpretive collections, or expensive equipment.
- Working with purchase documents or large sums of money (amount to be determined by the district superintendent).
- Having access to the California Law Enforcement Teletype System (CLETS) or other criminal justice records.

Refer to Departmental Notice 2001-13, *Employment/Pre-Employment Criminal History Checks*, for legal requirements and administrative procedures for implementing criminal history background checks, or contact the Personnel Services Division or the Public Safety Section for further information.

A prospective volunteer should complete the *Volunteer Service Agreement – Confidential Information*, which requests permission from the volunteer for completion of a background check. The volunteer should complete the certification section only if a background check is required. The prospective volunteer should also complete the *Pre-Employment Arrest/Conviction Disclosure Statement*, which the designated division/district/sector personnel officer should process as a confidential document.

2. Background Check: Payment of Fees

California law authorizes certain governmental and private organizations to conduct criminal record background checks to help determine the suitability of a person applying for a license, employment or as a volunteer working with children, the elderly or disabled.

Fees for background checks will vary according to the level of Live Scan service. Please see the reference chart above and refer to the website of the Office of the California Attorney General (to determine what background check services are required for the volunteer).

Costs may include fingerprinting fee, California Department of Justice Criminal Offender Record Information (CORI) fee, FBI CORI fee, Firearms Eligibility fee, and/or Child Abuse Central Index (CACI) fee. Requiring volunteers to cover the full cost of background checks may deter or prevent many people from applying to serve as volunteers.

Agencies able to cover costs for Live Scan services can refer to the following example policy:

Example: California Department of Parks and Recreation

"The volunteer should complete the *Request for Live Scan Service* BCII 8016

Regulations page 48

Form BCII 8016 and

Form BCII 8016 Instructions

The district should bear responsibility for adding the district billing code to the *Request for Live Scan Service*, and paying all fees related to processing of the fingerprint scan by the Department of Justice."

3. Medical Clearance

a. Medical Condition and Physical Limitation

The designated agency/department personnel officer or headquarters' personnel officer should determine whether a described medical condition or limitation would impact the volunteer's ability to safely complete the tasks identified in the job description. If the designated personnel officer determines that no significant risk exists, the prospective volunteer should be allowed to participate.

b. Essential Functions Health Questionnaire

A prospective long-term volunteer should complete an *Essential Functions Health Questionnaire* which, as a confidential document, is submitted directly to the designated agency/department personnel officer. A volunteer interested in serving at the agency/department headquarters should submit the completed Essential Functions Health Questionnaire to the headquarters' personnel office.

If the designated personnel officer determines (or is unable to determine) that the stated medical condition or limitation may reasonably impact the prospective volunteer's ability to complete the prescribed work in a safe manner, the designated personnel officer should forward the Health Questionnaire to the appropriate Workers' Compensation and Safety Program Officer at the agency/department. If additional review is needed, headquarters' personnel will submit the Health Questionnaire along with a copy of the job description, to the State Medical Officer for determination.

A prospective volunteer who is awaiting determination on a health questionnaire should not be allowed to begin volunteer service prior to receiving proper medical clearance. If the administrative officer deems appropriate, a prospective volunteer may begin classroom elements of volunteer training while awaiting final medical clearance.

G. Waivers

Each agency/department should develop their own standard form or other applicable waivers/agreements. Waivers function to establish that volunteers serve on a voluntary basis, are aware of safety rules and procedures, release all liability and enter into service at their own risk. A Volunteer Service Agreement can be used as a waiver and adapted for various volunteer positions and in different volunteer programs.

1. California Department of Parks and Recreation
Special Project or Activity Sign-in
2. Waiver: California Highway Patrol - (Appendix I A.1)
3. Youth Waiver: Hands On Sacramento
4. Youth Waiver: County of Fresno Library System

V. Travel and Property Usage

A. Vehicle Usage

1. Use of State Vehicles

NOTE: *Each agency/department should develop its own policies regarding the use of state vehicles. See below for a sample policy:*

Volunteers may operate state motor vehicles or equipment on state business when authorized by the appropriate program coordinator and when there is an approved job description outlining specific vehicle or equipment use. Volunteers should be subject to the same legal and administrative requirements as agency/department employees regarding drug testing.

Prior to a volunteer operating a state vehicle or driving a private vehicle on official state business, the program coordinator should:

- a. Verify that the volunteer is at least 18 years old and has a valid California driver license.
- b. Conduct a driving record check through the California Department of Motor Vehicles for California residents. Use the *Government Agency Request for Driver License/Identification Record Information* (INF 254 Appendix 1.D.1). For out-of-state residents, follow procedures for seasonal employees.
- c. Complete *Authorization to Use Privately Owned Vehicles on State Business* and submit to the designated administrative officer.
- d. Brief the volunteer on proper vehicle operation, maintenance and safety, including seat belt use and accident reporting requirements.
- e. Administer a driver's test, which should be passed for each type of vehicle to be operated.
- f. Require that the volunteer maintain a current *Equipment Operators Qualification Card* (Appendix I.E.1) for any vehicle or special equipment (chainsaws, power tools, tire changing equipment, etc.) to be operated.
- g. Prohibit any volunteer from operating law enforcement or emergency vehicles unless the vehicle is clearly marked "out of service."

2. Use of Privately Owned Vehicles

Volunteers may use their privately owned vehicles on state business if authorized by the appropriate agency/department authority. A valid driver's license is required if driving on state business.

The appropriate authority should approve *An Authorization to Use Privately Owned Vehicles on State Business* prior to the use of any privately owned vehicle by a volunteer.

3. Insurance

Under California Vehicle Code, Vehicle Code, (17151 – 17159) the driver of a vehicle has the primary liability for accidents arising out of maintenance or use of that vehicle. Private vehicle accidents should be reported to the volunteer driver's insurance company. The driver's insurance company is obligated to provide defense and indemnification for claims, up to the limits prescribed in Vehicle Code 17150 and 17151, as referenced in. State liability, if any, is secondary.

4. Reporting Vehicle Accidents

All motor vehicle accidents involving a state-owned vehicle or any motor vehicle being used on authorized state business should be reported within 48 hours utilizing a *Report of Vehicle Accident* STD 270

The completed *Report of Vehicle Accident* (STD 270) and four copies should be signed by the operator, approved by the agency/department's appropriate superintendent/manager or designee, and submitted to the driver's insurance company and to:

Department of General Services,
Office of Risk and Insurance Management (ORIM),
707 Third Street, First Floor,
West Sacramento, CA 95605
Phone: (916) 376-5300

NOTE: The *Report of Vehicle Accident* (STD 270) is a confidential document and should not be released to other parties without consent of ORIM.

Accidents resulting in any injury to persons, or involving serious damage to the property of others, should be reported immediately by telephone (916) 376-5302 or fax (916) 376-5277 to ORIM. ORIM administers the state motor vehicle liability self-insurance program. Contact:

CLAIMS INFORMATION
Toll Free: (800) 900-3634
Fax: (916) 376-5277
CALNET: 480-5302

To contact the claims unit by email and/or to notify ORIM of an accident or claim, use: claims@dgs.ca.gov

NOTE: Vehicle accident reporting procedures vary between departments/agencies, and internal policies should be verified.

B. Use of State Equipment

Each volunteer should maintain a current *Equipment Operators Qualification Card* or similar form (Appendix I.E.1) for operating special equipment such as chain saws, power tools, tire changing equipment, etc. Volunteers should demonstrate, to the satisfaction of the volunteer coordinator or qualified employee, proficiency in the safe operation of the equipment or machinery and a thorough understanding of all applicable safety measures. Volunteers should be age 18 or older to operate equipment capable of causing serious bodily harm.

1. Use of Personal Property

Volunteers should be discouraged from using personal property or equipment while conducting state business. Should any personal property such as vehicles, computers, binoculars, cameras, flashlights, and bicycles, be lost, damaged or stolen while being used on state business, the state cannot be held liable.

Volunteers should not borrow state equipment for personal use. Such unauthorized use of state owned equipment may result in termination of a volunteer's active status.

2. Volunteer Uniform Policy

Uniforms can be as simple as a volunteer patch developed by the agency/department or a name badge, or a specific shirt and hat, or as complex as full uniform. Agencies/departments are responsible for determining appropriate dress codes/uniform policies and volunteer program managers are responsible for implementing those policies with volunteers, including who will be responsible for payment of costs for uniforms. Following is an example of a uniform policy.

Example: California Highway Patrol

UNIFORM STANDARDS.

a. Basic Uniform.

All senior volunteers who serve in an in-view capacity and participating in assignments other than office work within a department facility, shall possess and maintain, ready for immediate use, the basic uniform and equipment items required by this manual. Upon completing initial training, volunteers will be required to purchase and maintain a minimum of one long-sleeve uniform shirt, one pair of uniform trousers, basket weave uniform belt, volunteer patches, royal navy blue tie, brass name plate, and the 100 percent cotton utility cap and brass volunteer badge.

b. Formal Uniform.

In addition to the basic uniform, and with the approval of the Area commander volunteers may also purchase a formal uniform. The formal uniform consists of the formal jacket, matching wool uniform trousers, uniform shirt, tie, belt, socks, departmentally approved footwear, departmentally approved name plate, departmentally approved badge, and the campaign hat.

The California Highway Patrol manual further describes the exact color and type of clothing to be worn. Other agencies/departments may not be as specific, depending on the nature of the volunteer work.

3. Travel Expense Claims

Volunteers are responsible for any personal costs incurred through their service as a volunteer to an agency/department. However, the appropriate supervisor or director may authorize the agency/department's reimbursement to volunteers of approved travel-related expenses. Reimbursement limits for meals and lodging for volunteers are the same as for paid state employees.

Volunteers should be reimbursed for travel expenses under the following conditions:

- a.** The designated agency/department representative lists travel as a specific duty on the volunteer's job description and pre-approves travel assignments.
- b.** The volunteer completes and has an approved *Oath of Allegiance* on file.
- c.** Volunteers must purchase the least expensive round-trip or special rate ticket available. Otherwise the difference will be deducted from the claim. If the volunteer travels between the same points without using round-trip tickets, an explanation should be given
- d.** The volunteer completes and submits an approved Travel Expense Claim (TEC).

TRAVEL EXPENSE CLAIM STANDARDS

- I. Show how transportation was obtained if fare was not purchased for cash. Use “CC” for credit card and “C” for cash. Attach all passenger coupons and ticket order stubs including the unused portion of tickets, other credit documents or premiums, where credits or refunds are due to the State.
- II. Type of Transportation used—Use “R” for railway, “B” for bus, airporter, light rail, or BART, “A” for scheduled commercial airline, “RA” for rental aircraft, “DA” for department-owned aircraft, “PA” for privately owned aircraft, “PC” for privately owned car, truck or other privately owned vehicles, “SV” for specially equipped vehicle for the handicapped, “SC” for State vehicles, “RC” for rental vehicles, “T” for taxi, and “BI” for bicycle. Supervisors shall not authorize the use of motorcycles on official State business, and no reimbursement will be allowed for motorcycles.
- III. Car Fare, Tolls and Parking—Enter streetcar, ferry, local rapid transit, taxi, shuttle or hotel-bus fares, bridge and road tolls, and parking charges; attach a voucher for any parking charge in excess of \$10.00 for any one continuous period of parking and each item of expense in this item.
- IV. Private Car Use—Enter number of miles traveled and amount due for mileage for the use of privately owned automobiles as authorized by current agreements and DPA regulations 599.631

4. Options for State Housing and Facilities

Agencies/departments that provide temporary state housing to employees of certain programs, should assess if they can also provide that housing to volunteers and determine the appropriate policy.

Example: California Department of Parks and Recreation

Active department volunteers may be lodged in state housing/facilities, under the same policies that apply to seasonal employees.

5. Use of Firearms, Ammunition

Volunteers are **not** authorized to handle contemporary firearms and/or ammunition while serving as a volunteer, even if they hold permits for those materials.

Note: The only exception to this rule occurs in some cases of period re-enactments, such as at State Parks, where volunteers may use antique firearms, replicas of antique firearms, or black powder on a case-by-case basis.

VI. Program Planning and Establishment

A. Staff Engagement

1. Executive and Peer Buy-in

The key to a successful volunteer program is securing the support of agency/department staff.

Securing Executive Support

When starting a new volunteer program, it is critical to communicate plans and goals with senior staff, to not only to gain their permission, but ensure that they are invested in the program's success. Volunteer managers should meet regularly with supervisors to specifically communicate the needs and value of the volunteer program. Common needs for a volunteer program include providing staff to train and supervise volunteers, and securing related funding.

During meetings with senior staff, emphasize the value of the volunteer program and how volunteers will strengthen the existing mission of the agency/department. Volunteer programs can provide an exceptional return on investment when managed properly, (The Value of Volunteers page 10). Develop goals and objectives for the volunteer program and make periodic reports to management and staff to demonstrate the role the volunteer program plays and the value it brings.

Securing Peer Support

Agency and department leadership has the role of encouraging employees to be aware of the associated demands and great potential of a successful volunteer program. Volunteers present a beneficial way to supplement the work of paid staff and relieve some pressure from those staff members, NOT replace them. California Government Code 3112(g) states that the purpose of volunteers in an agency/department is not to "replace or supplant public employees...but that they add new dimensions". Emphasize to staff members that the volunteer program is an asset to the department, and would be a valuable experience from which they may gain management experience.

The following chart identifies issues specific to staff concerns and steps to take to avoid and resolve potential problems.

BEST PRACTICES AND RECOMMENDED POLICIES

A MANUAL FOR VOLUNTEER PROGRAMS AT STATE AGENCIES

CHART V. Staff Concerns and Conflict Resolution

| Reasons for Staff Concerns About Involving Volunteers | Steps to Take to Avoid Problems |
|---|--|
| Fear of job replacement. | <ul style="list-style-type: none"> • Establish official policy on supplementing, not supplanting staff. • Clearly define roles; involve staff in that process. |
| Fear of decrease in quality. | <ul style="list-style-type: none"> • Involve staff in designing and presenting volunteer training. • Establish volunteer evaluation process. |
| Unclear about volunteer/staff roles. | <ul style="list-style-type: none"> • Provide written job descriptions and training for volunteers. |
| Previous bad experience. | <ul style="list-style-type: none"> • Show job description format and ask for staff help in writing others. • Reassure about careful selection, training, supervision, and the right to reassign or terminate volunteers if necessary. • Offer to provide support as needed. • Identify the benefits. |
| Resentment of additional workload. | <ul style="list-style-type: none"> • Emphasize that work should be within scope of current workload. • If it is a legitimate concern, redistribute workload as necessary. |
| Fear of change | <ul style="list-style-type: none"> • Involve staff in planning processes. • Share success stories. |
| Fear of loss of control | <ul style="list-style-type: none"> • Remind staff that current service can be enhanced with additional help. • Train staff in delegation, supervision, management. • Emphasize the new, valuable skills staff members will develop. |

(Table adapted from *Volunteer Involvement in California Library: "Best Practices"*
<http://www.library.ca.gov/lds/getinvolved/docs/F-resources/VolunteerInvolvementInCaliforniaLibraries-BestPractices.pdf>)

2. Reporting Structure

Some agencies and departments will hire a volunteer manager while others will utilize existing supervisors and/or managers to manage volunteers. Carefully consider the staffing options available. Determine whether or not volunteer program staff will be solely responsible for volunteer program activities. When training and managing staff, confirm the line of command to ensure they know to report to the appropriate person.

The management of the department's volunteer program can be a multi-level task, with overall guidelines and policy development established and maintained through the volunteer program's coordinator in the agency/department/division. For some agencies, the diversity of volunteer programs and wide-ranging geographic locations of programs require local management and supervision by individual divisions.

The demands of the program may necessitate numerous positions on multiple levels. A clear reporting structure is useful in creating organization within the volunteer program. General descriptions of volunteer program coordinator roles and how they may interact. (Appendix II.D.2 and Appendix II.D.3).

NOTE: *Each agency/department should develop its own organizational and reporting structure.*

B. Identify Program Priorities and Requirements

1. Solution Focused Planning

Every unit within a California agency or department adheres to a specific mission and is generally charged with:

- Improving public service
- Protecting public resources
- Maintaining strong relations with the public

Following these six steps of the problem-solving process will help to determine if a volunteer program would help to meet the agency/department needs:

1. Identify the problem
2. Analyze the problem
3. Generate potential solutions
4. Select and plan the solution
5. Implement the solution
6. Evaluate the effectiveness of the solution

2. Mission Statement

A mission statement defines the reason why an agency/department is involving volunteers. It should also reflect the agency/department mission and can describe *how* volunteers will be utilized/treated in the agency/department.

“One size does not fit all – it should reflect your ... philosophy, and be ‘owned’ and understood by the people who will make it work” – Carla Lehn, California State Library.

Sample mission statements follow:

Example: California Department of Parks and Recreation- Department

“The mission of the California Department of Parks and Recreation is to provide for the health, inspiration and education of the people of California by helping to preserve the state’s extraordinary biological diversity, protecting its most valuable natural and cultural resources, and creating opportunities for high quality outdoor recreation.”

Example: California Highway Patrol Senior Volunteer Program

“To assist the CHP in providing enhanced public service to the community. To provide an opportunity for senior citizens to make a definitive contribution toward improving public safety and service. To instill among participating volunteers an understanding and appreciation of the justice system, human relations, and ethics in the field of law enforcement.”

Example: City Library – Volunteer Program Mission Statement

“The Library’s Mission is to inform, to enhance the quality of life, and to foster lifelong learning. The library is committed to the idea that involving volunteers in its operation will assist it in carrying out its mission for the community.”

3. Needs Assessment

A needs assessment is a formal investigation of how volunteers can serve an agency and what types of volunteer skills are needed. A well managed volunteer program has the potential to increase the effectiveness of public services, but it will also create some additional demands upon staff time and funding. Be sure to determine the agency/departments' specific policies regarding volunteers. Volunteers can only be brought in to support and assist staff with their responsibilities.

A volunteer needs assessment should include a list of all the desired projects, tasks or activities where volunteer assistance may be needed. Identify the following:

- Tasks currently performed by staff where assistance is needed.
- Tasks not performed by staff members.
- Staff activities, which might be performed by volunteers when staff is off-duty.

Include all staff in an ongoing evaluation of the volunteer program. Follow these steps in conducting a needs assessment:

- a. **Review** the list of projects, tasks or activities: it should be both comprehensive and specific.
- b. **Rank** the items according to the commitment of time required on the part of staff to train and supervise volunteers.
- c. **Establish** priorities based on the department's needs and the level of support available.

Start small. Make positive changes incrementally. Any change, including introducing volunteers, should not be viewed as a one-time answer to an identified problem, because there is generally more than one solution. In places where volunteer programs are new, there are always procedures to develop and problems to resolve. Begin with small volunteer projects and expand the program as department staff and volunteers become familiar with their duties.

C. Volunteer Position Description

A designated agency or department representative should develop clear and concise volunteer position descriptions for each volunteer position or function before recruiting volunteers and ensure that volunteers understand their duties and responsibilities. With the benefit of a well thought-out position description, potential volunteers can make informed decisions about accepting volunteer positions based on clear expectations of the position and the skills and qualifications required.

The volunteer position description should outline specific volunteer responsibilities, performance standards, and the supervisory chain of command. A volunteer position description typically includes the following items:

1. Title
2. Purpose/importance of the position
3. Duties/responsibilities
4. Training provided - initial and ongoing
5. Tasks the volunteer will perform
6. Time required for each task
7. Time commitment
8. Length of commitment
9. Reporting
10. Benefits to volunteers
11. Skills/qualifications
12. Supervisory path
13. Grounds for termination
14. Contact person
15. Date revised

Recent research shows that as volunteers gain experience in their area of expertise they are increasingly interested in high impact volunteer positions that allow them to utilize their skills. Recent research shows that a shift in volunteer interest is evident among Baby Boomers, Generation X and Millennials. To attract skills-based volunteers, organizations need to provide high impact positions that allow the volunteers to utilize their skills.

While it is possible to recruit this talent using a position description developed by the agency, highly skilled volunteers may also be interested in helping to craft their role in the organization. Be flexible when appropriate to ensure the benefits of volunteers' skills are maximized.

Volunteer Position Description forms – (Appendix II.D.4).

Another good resource when developing volunteer position descriptions is Carla Lehn's *Volunteer Involvement in California Libraries: "Best Practices."*
<http://www.library.ca.gov/lds/getinvolved/docs/F-resources/VolunteerInvolvementInCaliforniaLibraries-BestPractices.pdf>

D. Recruitment and Placement

It is strongly recommended that the agency/department delay recruitment until the preliminary structure of the volunteer program is completed. Manage the recruitment, interviewing, selection and placement of volunteers based on defined job descriptions. Current volunteers are among the best recruitment resources. While considering other recruitment tools, be sure to also advertise the volunteer program and volunteer opportunities on the agency/department website as well as other volunteer recruitment websites.

Proper screening, interviewing, and placement are essential to program success. Volunteers who will serve long-term with an agency and/or will provide high-level (expert) support should be interviewed much like for a paid position. Standard Human Resource protocols should be followed, as appropriate, to the volunteer position and the term of service.

VII. Managing a Volunteer Program

A. Orientation

Orientation is not training and should not be used to teach skills or provide volunteers the depth of knowledge they may need to do their jobs. The volunteer supervisor should use the orientation to:

1. Introduce a volunteer to the staff and co-workers
2. Introduce the agency/department and its mission
3. Establish volunteer performance standards
4. Provide an overview of the volunteer's first assignment
5. Inform the volunteer of liability protection and injury compensation.

An orientation checklist should be completed and kept with the volunteer's file. (Appendix II.D.1-3).

B. Equal Opportunity

1. Anti-Discrimination

Discrimination is defined as unfair treatment of one person or group based solely on class or category. Discrimination in any form by/against volunteers or staff members should not be tolerated in the workplace and must be handled according to agency/department policy and state and federal law.

In the State of California, it is illegal to discriminate against someone based on their: race, national origin, ethnic group identification, religion, age, sex, sexual orientation, color, mental disability, physical disability, political affiliation, political or religious opinion, ancestry, medical condition, marital status, or other non-job related factors Government Code, 11135a, 12940a, 18500c)

Race, national origin, ethnic group identification, religion, age, sex, sexual orientation, color, and disability also "includes a perception that a person has any of those characteristics or that the person is associated with a person who has, or is perceived to have, any of those characteristics" Government Code 11135f). Furthermore, "gender," under California Penal Code 422.56c, is included in "sex" and encompasses both an individual's "gender identity and gender related appearance and behavior whether or not stereotypically associated with the person's assigned sex at birth." Penal Code 422.56c)

However, there may be cases when, due to a medical condition or mental/physical disability, an individual may be unable to perform the essential duties required of their position, even with reasonable accommodations. Similarly, even with reasonable accommodations, the individual may not be able to perform the essential duties of the volunteer position in a manner that would not endanger the health or safety of the volunteer or others. In such cases, the agency/department may not be prohibited from discharging or refusing to place the individual in that volunteer position. (Penal Code 422.56c, Government

Code 12940c). This however, is a case-by-case determination that should be referred to the appropriate legal staff.

2. Bullying and Sexual Harassment

Volunteers should be treated the same as paid employees in cases of harassment. The Equal Employment Opportunity Commission Guidelines, 29 C.F.R. Section 1604.11, provide the following definition of sexual harassment:

“Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when:

1. submission to such conduct is made either explicitly or implicitly a term or condition of an individual’s employment,
2. submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual, or
3. such conduct has the purpose or effect of unreasonably interfering with an individual’s work performance or creating an intimidating, hostile or offensive working environment.”

Sexual harassment, bullying and other forms of harassment in the volunteer environment should be treated seriously. If a volunteer, or any staff member, raises a concern it needs to be addressed quickly and confidentially. Refer to the department agency/department’s policies for how to appropriately deal with cases of harassment.

C. Productive Work Environment

To ensure the success and productivity of a volunteer program, the agency/department should make such provisions as providing adequate equipment and supplies, offering appropriate training, management and supervision, and striving to extend meaningful work opportunities that make full use of volunteers’ unique skills.

To further maintain a productive and healthy work environment, establish and make clear the roles and rights of both the volunteer and the agency/department. Consider the following points on the chart below, adapted from the *Volunteer Handbook* by the Central Volunteer Managers Network in Adelaide, Australia:

BEST PRACTICES AND RECOMMENDED POLICIES

A MANUAL FOR VOLUNTEER PROGRAMS AT STATE AGENCIES

CHART VI Volunteer and Agency/Departments Rights and Responsibility

| Volunteer Has the Right to: | Agency/Department Has the Right to: |
|---|---|
| <ul style="list-style-type: none"> • A healthy and safe environment • A role description and agreed hours of contribution • Appropriate training, orientation and support • Accurate and truthful information about the organization • A copy of the organization's volunteer policy, or policy and procedures that affect volunteer role • Not fill a formerly paid position • Have confidential and personal information handled in accordance with state and federal law • Be treated in accordance with equal opportunity and anti-discrimination legislation | <ul style="list-style-type: none"> • Set the parameters and guidelines of volunteer positions • Make decisions re: placement of volunteers • Review volunteer performance according to dept/agency policies • Expect volunteers to perform tasks to the best of their ability • Expect volunteers to be prompt, reliable, courteous and respectful • Release any volunteer not appropriate for position |
| Volunteer Has the Responsibility to: | Agency/Department Has the Responsibility to: |
| <ul style="list-style-type: none"> • Undertake training as required • Carry out the tasks of the position according to the position description • Ask for support when needed • Raise any issues the department may have with the organization through the proper channels • Give advanced notice before absences • Respect confidentiality • Demonstrate courtesy, accountability and reliability • Be committed to the organization • Give notice before leaving the organization | <ul style="list-style-type: none"> • Provide orientation and necessary training • Provide any required, related documentation • Provide a clear outline of volunteer duties • Provide supervision and support of volunteers • Provide complaint and conflict resolution procedures • Include volunteers in relevant decision-making processes • Provide safe, healthy working conditions |

D. Program Maintenance

1. Program Leadership

The successful program leader involves their staff in the planning process, develops goals and objectives for the program, monitors the program's progress, and makes periodic reports to management and staff. Working with the appropriate staff, the program leader should identify and develop meaningful jobs for volunteers that can assist the department/agency in achieving its goals. The strong program leader also can develop and oversee training and consultation programs for staff to ensure their acceptance and understanding of the volunteer program and to develop the skills needed to successfully carry out their critical role.

It is important to keep the director and staff informed about volunteer success stories and recruitment needs. This can help in the development of appropriate recognition programs for volunteers. It will also aid in seeing that attractive volunteer recruitment materials are developed and distributed through appropriate channels. Ensuring that sufficient written policies and procedures are in place for volunteer services and periodically reviewing them to ensure continued relevance are also vital leadership duties. For example policies of volunteer leader roles and reporting structures and how they interact, Appendix II.D.2 and Appendix II.D.3.

2. Assessment and Review

Periodic assessments and reviews of performance provide vital two-way communication between volunteers and their program leaders and supervisors. Frequent, informal evaluations furnish volunteers with feedback on the quality of their work. Such evaluations also enable supervisors to recognize potential program-wide problem areas that may need to be addressed with additional training or other actions.

The volunteer coordinator should conduct informal interviews with new volunteers after the first four to six weeks. Include space on the back of the departments *Volunteer Service Agreements* to record periodic evaluations. The evaluations can be used as a reference for identifying needed training for current and future volunteers and assignments. Give a written copy of all evaluations to the volunteer.

Allow volunteers to evaluate the program; they can tell the department what is good and what needs to be improved — things the department may not necessarily see while working on the “inside.” These program evaluations can occur informally through a suggestion box or formally through a survey or an exit interview.

3. Problem Solving

The volunteer coordinator should strive to resolve volunteer conflicts or concerns at the lowest level possible, and as quickly as possible. If problem-solving measures do not improve the situation and the volunteer cannot be assigned to another project or task without a reoccurrence of the problem, the issue may be escalated to a more senior leadership if appropriate. In cases that cannot be resolved, termination of a volunteer's services may be required. The agency should always consult the appropriate legal staff or personnel staff before terminating the volunteer.

VIII. Separation Procedures and Documentation

A. Separation

Volunteers may decide to end their service for a wide range of reasons, including the completion of a specific project, relocation to another area, personal or family obligations, or a career/job change. A notation summarizing the reasons for separation, and any letter of resignation, should be attached to the *Volunteer Service Agreement*, for future reference.

B. Termination

Either the agency/department or the volunteer may terminate the *Volunteer Service Agreement* at any time and without cause. The department is not required to accept or retain any person who volunteers his or her services. It remains both the prerogative and the responsibility of the agency/department to determine whether a specific volunteer or volunteer group is appropriate for its needs and requirements.

If necessary, the supervisor can terminate the agreement if the volunteer repeatedly fails to fulfill his or her responsibilities as specified on the *Volunteer Service Agreement* and position description, if he or she violates department policies related to discrimination or harassment, or if he or she is not performing satisfactorily. When a volunteer's services are terminated, both the supervisor and the volunteer should sign the *Volunteer Service Agreement*, although the volunteer's signature is not required.

C. Documentation

The designated department representative should complete the separation sections on the lower half of the *Volunteer Service Agreement* to document the termination. The completed *Volunteer Service Agreement* and its attached documentation, including the job description, should be retained for five years following a volunteer's separation. If the volunteer intends to use his or her work experience as a means of qualifying for a job either in or outside the department, the volunteer may request and the supervisor may provide a letter verifying the type of work performed.

D. Returning Passes/Keys

Volunteers should return passes/keys to access the agency/department upon separation. Passes to special events or other items given as a reward for volunteering should be viewed as the property of the volunteers unless stated otherwise.

E. Exit Interview

An exit interview can be helpful to both the volunteer and agency/department to conduct when an individual terminates service. (Appendix I.F.1 and California State Library). It is critical to also solicit feedback from volunteers; have them evaluate the program in addition to the department evaluating them.

IX. Rewarding Achievement

A. Recognition

Meaningful recognition is a vital element for retaining valuable volunteers, and helps ensure quality programs while reducing the need for ongoing recruitment and training. Each agency/department should determine its own policies regarding recognition based on the interests of its volunteers.

Rewarding the achievements and contributions of volunteers, if presented by department staff on a regular basis and at differing levels of formality, can be a strong motivational tool that helps increase volunteer productivity and retention rates.

B. Benefits

There are many ways to motivate volunteers in addition to departmental awards. There are certain tangible and intangible benefits that agencies/departments can offer to reward and recognize the contribution of volunteers. Consider and articulate intangible but important benefits for the volunteer such as the opportunity to learn something new or to brush up on or enhance existing skills. Additional intangible benefits that relate to the volunteer's motivation should be articulated such as the "opportunity to make the difference in the life of a child," or "the chance to learn about diverse cultures."

Some tangible benefits may be appropriate. The following is an example of how California Parks and Recreation determines the appropriate benefits to award volunteers for hours of service provided:

Example: California Parks and Recreation

Complimentary Park Passes

There are two types of complimentary park passes for active volunteers in the Volunteers in Parks Program: the *VIP District Pass* (DPR 208F) and the *VIP Statewide Pass* (DPR 208E).

VIP District Passes (DPR 208F)

District passes are awarded to volunteers as a way of ensuring free and convenient access into the state park where they are volunteering, and encouraging them to spend more time learning about other parks in their district. The annual district pass may be made available at the district level to all volunteers who meet the minimum work requirements for maintaining active volunteer status, as established by the district superintendent. The pass allows the volunteer free day-use access to all of the district's state park units for the current calendar year.

VIP Statewide Pass (DPR 208E)

For volunteers who contribute at least 200 hours of their time each year, a statewide day-use pass is awarded both as a way to thank them for their work and to encourage their further exploration of the state park system. Service time cannot be accrued over different years. The annual statewide pass is valid for one calendar year. The pass allows the volunteer day-use access to all state park units, with the exception of Hearst Castle and other units as determined by management.

X. Resources and Funding Options

A. Potential Program Costs

Volunteers are a valuable asset to the agency/department; however, it takes funding and other resources to implement and maintain an impactful volunteer program. Costs to consider when establishing a volunteer program include, but are not limited to:

1. Background checks
2. Staff time involved with training and supervising volunteers
3. Training expenses
4. Materials necessary for work responsibilities
5. Work station space and equipment for volunteers
6. Uniforms
7. Travel expenses
8. Recognition materials

B. Potential Program Resources

Necessary resources to support the agency/department's volunteer program can be secured from a wide variety of sources and may include:

1. Funds from the agency/department's budget
2. Financial and/or in-kind donations from businesses, individuals, and other sources
3. Federal or state grants
4. Grants from private companies or foundations

APPENDIX

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APPENDIX I

FORMS

A. Waivers

Waiver: California Highway Patrol

STATE OF CALIFORNIA
DEPARTMENT OF CALIFORNIA HIGHWAY PATROL
RELEASE AND WAIVER OF LIABILITY
CHP 428 (Rev. 2013) OPI 051

| | | |
|---|------------|------------------|
| <p>In consideration of being permitted to ride in a California Highway Patrol vehicle or aircraft, the undersigned assumes all the risks of damage or loss either to person or property from all and every cause, including negligence, violation of law, or willful misconduct on the part of the California Highway Patrol, its officers, employees, or agents during such ride or as in an incident thereto, or in connection therewith, it being the understanding that the State of California, the California Highway Patrol, its officers, employees, or agents, incur no liability or obligation to the undersigned, his/her heirs, successors or assigns other than to permit him/her to ride in such vehicle or aircraft at such times may be mutually agreed upon. This waiver applies to each and every ride which the undersigned may take in California Highway Patrol vehicle or aircraft on the undersigned date and/or shift.</p> <p>You are prohibited from taking photographs or making any type or recordings (e.g., video, audio) during a ride-along. Exceptions may only be made for members of the media and only with the approval of the respective Area commander. In addition, should you witness any type of incident (driving under the influence arrest, citation, etc.); you may be subpoenaed to testify in court as a witness.</p> <p>I hereby consent to receive/consent my minor child/ward to receive medical and hospital treatment that they may be deemed advisable in the event of an injury, accident, and/or illness during the ride-a-long.</p> | | |
| PARTICIPANT'S NAME (LAST, FIRST, MIDDLE) | | DATE |
| ADDRESS | | TELEPHONE NUMBER |
| SIGNATURE (PARTICIPANT'S PARENTAL/LEGAL GUARDIAN) | | DATE |
| EMERGENCY CONTACT | | TELEPHONE NUMBER |
| SHIFT SUPERVISOR / CREW NUMBER | | DATE |
| (below for office use) | | |
| EMPLOYEE ASSIGNED | DATE/SHIFT | DURATION |

B. Volunteer Intake

1. Volunteer Position Descriptions Sample Form

| STATE VOLUNTEER PROGRAM NAME | |
|--|--|
| | |
| Volunteer Position: | |
| Importance of Position: | |
| Qualifications: | |
| Responsible to: | |
| Responsibilities: 1. 2. 3. 4. | |
| Training Provided: | |
| Benefits of Volunteering: | |
| Time Commitment: | |
| Length of Commitment: | |
| Grounds for Termination: | |
| Contact Person: | |
| | |
| Date Revised: | |

2. Volunteer Application: California Highway Patrol

SENIOR VOLUNTEER PROGRAM APPLICATION FORM (CHP 462)

STATE OF CALIFORNIA
DEPARTMENT OF CALIFORNIA HIGHWAY PATROL

CONFIDENTIAL PERSONAL HISTORY STATEMENT AND OTHER ASSOCIATED FORMS, SENIOR VOLUNTEER

CHP 462 (Rev. 7-04) OPI 015

Instructions to the Applicant: The information requested on each of the forms in this packet is required to determine your eligibility and qualifications for appointment as a Volunteer with the California Highway Patrol (CHP). Failure to answer all questions completely and accurately may be cause for denial of acceptance. The Personal History Statement will be used in the assessment of your qualifications for the position you are seeking.

A background investigation and fingerprint check will then be conducted to determine your suitability for appointment to the CHP Senior Volunteer Program. Successful completion of the background investigation and fingerprint check may result in your appointment.

The completion of this form is mandatory. You will be required to certify that there are no willful misrepresentations, omissions or falsifications, and that all statements are true and correct.

All statements are subject to verification.

All time periods in your background must be accounted for.

It is to your advantage to respond openly and truthfully. Any negative factor in your background will be evaluated in terms of the circumstances and facts surrounding its occurrence and its degree of relevance to the position in which you have applied.

Completing Item 12: You need **NOT** list a conviction when the record of such an incident has been **sealed** in accordance with Penal Code Section 1203.45, 851.8; nor if your record has been **expunged** or is **expungeable** pursuant to Health and Safety Code 11361.5, which Section pertains to various marijuana offenses, or the conviction was under Health and Safety Code Section 11557 or its successor 11366 when the conviction was stipulated or designed to be a lesser included offense of the offense of possession of marijuana. However, you must list the conviction if you have received a **release** (per Section 1203.4 or 1203.4a of the Penal Code or Welfare and Institutions Code Section 1179 or 1772) or a **pardon** (per Section 4852.16 of the Penal Code).

Under the Information Practices Act, effective 7-1-78, you have the right of access to personal information (*but not confidential information*) relating to employment with this Department.

NOTE: Answer all questions. Write or print legibly in ink in your own handwriting. **DO NOT TYPE.** If an item does not apply, enter 'D.N.A.' If more space is required, attach as many sheets of 8 1/2 X 11 white paper as may be required. Number the comments. More than one comment may be placed on a page.

THIS IS NOT AN OFFER OF EMPLOYMENT AND IS INTENDED ONLY TO INFORM YOU OF THE STEPS TO BE TAKEN IN DETERMINING THAT YOU ARE OTHERWISE QUALIFIED FOR APPOINTMENT TO THE CALIFORNIA HIGHWAY PATROL SENIOR VOLUNTEER PROGRAM.

PRIVACY STATEMENT

PROVIDING INFORMATION: If you choose to participate in the interview process, it is required that you provide information on this form.

OTHER INFORMATION: During the course of the application and interview process, you may be requested to provide additional information regarding your qualifications, medical/health background, and conviction history.

ACCESS: Your completed applications and interview-related material submitted to the California Highway Patrol is considered confidential and becomes the property of the CHP. Due to its confidential nature, such information will not be returned. Only authorized personnel directly involved in the employment process, and the applicant, once accepted, will be allowed access.

**CONFIDENTIAL PERSONAL HISTORY STATEMENT AND OTHER ASSOCIATED FORMS,
SENIOR VOLUNTEER**

CHP 462 (Rev. 7-04) OPI 015

1. NAME (LAST, FIRST, MIDDLE)

2. OTHER NAMES (INCLUDING NICKNAMES), ALIASES AND MAIDEN NAMES YOU HAVE USED OR BEEN KNOWN BY

| | | | |
|---|------------------|---|------------------|
| 2A. RESIDENCE ADDRESS (IF DIFFERENT FROM MAILING ADDRESS) | | 2B. MAILING ADDRESS | |
| STREET NUMBER | | STREET NUMBER OR P.O. BOX NUMBER | |
| CITY | | CITY | |
| STATE, ZIP CODE | | STATE, ZIP CODE | |
| HOME TELEPHONE NUMBER (INCLUDING AREA CODE) | HOURS OF CONTACT | HOME TELEPHONE NUMBER (INCLUDING AREA CODE) | HOURS OF CONTACT |

RELATIVES EMPLOYED BY CHP

| NAME | RELATIONSHIP | POSITION | EMPLOYMENT LOCATION |
|------|--------------|----------|---------------------|
| | | | |
| | | | |
| | | | |
| | | | |

REFERENCES

3. LIST AS REFERENCES 3 INDIVIDUALS WHO HAVE KNOWLEDGE OF YOU AND YOUR PERSONAL QUALIFICATIONS. DO NOT LIST RELATIVES, FORMER OR PRESENT EMPLOYER, CO-WORKERS OR SCHOOL TEACHERS.

| | ADDRESS WHERE PERSON CAN BE CONTACTED (INCLUDE CITY, STATE AND ZIP CODE) | TELEPHONE NUMBER |
|------------|---|---------------------|
| A. NAME | | HOME () |
| OCCUPATION | | WORK () |
| B. NAME | | HOME () |
| OCCUPATION | | WORK () |
| C. NAME | | HOME () |
| OCCUPATION | | WORK () |

RESIDENCES (IF NEEDED, LIST ADDITIONAL RESIDENCES ON A SEPARATE SHEET OF PAPER)

4. LIST ALL RESIDENCES DURING THE LAST FIVE YEARS BEGINNING WITH YOUR CURRENT ADDRESS.

| ADDRESS (INCLUDE CITY, STATE AND ZIP CODE) | NAME(S) OF PERSON(S) RESIDED WITH, INCLUDE PHONE NUMBER(S) | DATES (MONTH/YEAR) | | IF RENTED, GIVE NAME, ADDRESS & PHONE NO. OF PERSON, OR AGENCY RESPONSIBLE FOR THE COLLECTION OF RENT |
|--|---|-----------------------|----|--|
| | | FROM | TO | |
| A. | | | | |
| B. | | | | |
| C. | | | | |
| D. | | | | |

E. HAVE YOU EVER LEFT ANY RESIDENCE UNDER UNFAVORABLE CIRCUMSTANCES? ☐ Yes, explain ☐ No

EMPLOYMENT AND EXPERIENCE

5. HAVE YOU EVER BEEN INVESTIGATED AS A JOB APPLICANT? (BACKGROUND INVESTIGATION, SECURITY CLEARANCE, ETC.)

☐ Yes ☐ No

IF YES, COMPLETE THE FOLLOWING, INCLUDING ALL INCIDENTS:

| DATE | CIRCUMSTANCES |
|------|---------------|
| | |
| | |
| | |

6. BEGINNING WITH YOUR MOST CURRENT EMPLOYMENT, LIST ALL JOBS (PART-TIME, TEMPORARY, MILITARY SERVICE, VOLUNTEER) YOU HAVE HELD IN THE PAST SEVEN YEARS.

| A. PERIOD AND TYPE OF EMPLOYMENT | | NAME AND ADDRESS OF EMPLOYER | |
|---|--------------|--|-------------------------------|
| FROM | TO | COMPANY NAME | PHONE NO. (INCLUDE AREA CODE) |
| <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Voluntary | | ADDRESS (INCLUDE CITY, STATE, ZIP CODE) | |
| JOB TITLE AND MOST IMPORTANT DUTIES PERFORMED | | NAMES OF AT LEAST ONE SUPERVISOR AND ONE CO-WORKER | |
| TITLE | SALARY \$ | SUPERVISOR(S) | |
| DUTIES | | CO-WORKER(S) | |
| | | REASON FOR LEAVING | |
| INDICATE ANY PERIOD OF MILITARY SERVICE OR UNEMPLOYMENT | | FROM | TO |
| | | | |
| B. PERIOD AND TYPE OF EMPLOYMENT | | NAME AND ADDRESS OF EMPLOYER | |
| FROM | TO | COMPANY NAME | PHONE NO. (INCLUDE AREA CODE) |
| <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Voluntary | | ADDRESS (INCLUDE CITY, STATE, ZIP CODE) | |
| JOB TITLE AND MOST IMPORTANT DUTIES PERFORMED | | NAMES OF AT LEAST ONE SUPERVISOR AND ONE CO-WORKER | |
| TITLE | SALARY \$ | SUPERVISOR(S) | |
| DUTIES | | CO-WORKER(S) | |
| | | REASON FOR LEAVING | |
| INDICATE ANY PERIOD OF MILITARY SERVICE OR UNEMPLOYMENT | | FROM | TO |
| | | | |
| WOULD THERE BE ANY PROBLEM IF YOUR PRESENT EMPLOYER IS CONTACTED IN THE COURSE OF THE BACKGROUND INVESTIGATION? | | | |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | | | |
| IF YES, EXPLAIN: | | | |
| | | | |

EMPLOYMENT AND EXPERIENCE *(continued)*

| C. PERIOD AND TYPE OF EMPLOYMENT | | NAME AND ADDRESS OF EMPLOYER | |
|--|--------------|--|-------------------------------|
| FROM | TO | COMPANY NAME | PHONE NO. (INCLUDE AREA CODE) |
| <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Voluntary | | ADDRESS (INCLUDE CITY, STATE, ZIP CODE) | |
| JOB TITLE AND MOST IMPORTANT DUTIES PERFORMED | | NAMES OF AT LEAST ONE SUPERVISOR AND ONE CO-WORKER | |
| TITLE | SALARY \$ | SUPERVISOR(S) | |
| DUTIES | | CO-WORKER(S) | |
| | | REASON FOR LEAVING | |
| INDICATE ANY PERIOD OF MILITARY SERVICE OR UNEMPLOYMENT | | FROM | TO |
| 7. HAVE YOU EVER BEEN GIVEN A FORMAL REPRIMAND OR WARNING AT ANY PLACE OF EMPLOYMENT? (ORAL OR WRITTEN) <input type="checkbox"/> Yes <input type="checkbox"/> No | | | |
| IF YES, GIVE THE NAME OF THE EMPLOYER(S) AND DATE(S) AND EXPLAIN CIRCUMSTANCES. | | | |

8. HAVE YOU EVER BEEN SUSPENDED, FIRED, OR ASKED TO RESIGN FROM ANY EMPLOYMENT? ☐ Yes ☐ No
- IF YES, GIVE THE NAME OF THE EMPLOYER(S) AND DATE(S) AND EXPLAIN CIRCUMSTANCES.

EMPLOYMENT AND EXPERIENCE *(continued)*

9. HAVE YOU EVER BEEN REJECTED DURING THE PROBATIONARY PERIOD FROM ANY EMPLOYMENT?

☐ Yes ☐ No

IF YES, GIVE THE NAME OF THE EMPLOYER(S) AND DATE(S) AND EXPLAIN CIRCUMSTANCES.

10. HAVE YOU EVER RESIGNED FROM ANY POSITION OR EMPLOYMENT UNDER PRESSURE OR UNFAVORABLE CIRCUMSTANCES?

☐ Yes ☐ No

IF YES, GIVE THE NAME OF THE EMPLOYER(S) AND DATE(S) AND EXPLAIN CIRCUMSTANCES.

11. HAVE YOU EVER BEEN CONVICTED OF ANY OFFENSE? (DO NOT INCLUDE TRAFFIC CITATIONS)

☐ Yes ☐ No

| DATE | LOCATION (CITY AND STATE) | CHARGES FILED (IF ANY) | FINAL CHARGE (IF AMENDED OR REDUCED) | DISPOSITION |
|------|------------------------------|---------------------------|---|-------------|
| | | | | |
| | | | | |

12. HAVE YOU EVER BEEN PLACED ON COURT PROBATION AS AN ADULT?

☐ Yes ☐ No

[illegible]

| 13. DRIVER LICENSE NO. / STATE | CLASS | EXPIRATION DATE | NAME UNDER WHICH LICENSE WAS GRANTED |
|--------------------------------|-------|-----------------|--------------------------------------|
| | | | |

| STATE | LICENSE NUMBER | NAME UNDER WHICH LICENSE WAS GRANTED | EXPIRATION DATE |
|-------|----------------|--------------------------------------|-----------------|
| | | | |
| | | | |

15. HAVE YOU EVER BEEN REFUSED A DRIVER'S LICENSE, HAD ONE REVOKED, SUSPENDED OR PLACED ON PROBATION OR NEGLIGENT OPERATOR'S STATUS?

IF YES, IN WHAT STATE, WHEN AND WHY?

☐ Yes ☐ No

[illegible]

MOTOR VEHICLE OPERATION *(continued)*

16. HAVE YOU BEEN INVOLVED AS A DRIVER IN A MOTOR VEHICLE ACCIDENT WITHIN THE LAST 5 YEARS?
IF YES, GIVE DETAILS FOR EACH.

☐ Yes ☐ No

| | | |
|--|----------------------------|---|
| DATE | LOCATION (STREET AND CITY) | <input type="checkbox"/> Injury <input type="checkbox"/> Non-Injury |
| POLICE REPORT? <input type="checkbox"/> Yes <input type="checkbox"/> No | POLICE AGENCY | REPORT NUMBER |
| DATE | LOCATION (STREET AND CITY) | <input type="checkbox"/> Injury <input type="checkbox"/> Non-Injury |
| POLICE REPORT? <input type="checkbox"/> Yes <input type="checkbox"/> No | POLICE AGENCY | REPORT NUMBER |
| DATE | LOCATION (STREET AND CITY) | <input type="checkbox"/> Injury <input type="checkbox"/> Non-Injury |
| POLICE REPORT? <input type="checkbox"/> Yes <input type="checkbox"/> No | POLICE AGENCY | REPORT NUMBER |

17. LIST ALL TRAFFIC CITATIONS (EXCEPT PARKING VIOLATIONS) YOU HAVE RECEIVED WITHIN THE LAST 3 YEARS. (INCLUDE MILITARY BASES)

| NATURE OF VIOLATION | LOCATION (CITY) | APPROXIMATE DATE | INDICATE WHETHER FINED OR ACTION TAKEN ON DRIVER'S LICENSE |
|---------------------|--------------------|---------------------|---|
| | | | |
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REMARKS

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| | |
|---|------|
| READ AND SIGN WHEN FIRST COMPLETING THIS DOCUMENT | |
| PENALTY | |
| Any falsification, withholding or failure to answer all questions completely and accurately may cause forfeiture of all rights to appointment to the California Highway Patrol Senior Volunteer Program. | |
| CERTIFICATION | |
| I hereby certify that there are no willful misrepresentations, omissions or falsifications in the foregoing statements and answers to questions, and that all statements and answers are true and correct to the best of my knowledge and belief. | |
| SIGNATURE <i>(sign in ink)</i> | DATE |

| | |
|---|------|
| READ AND SIGN IN THE PRESENCE OF CHP SUPERVISOR WHEN INTERVIEWED | |
| PENALTY | |
| Any falsification, withholding or failure to answer all questions completely and accurately may cause forfeiture of all rights to appointment to the California Highway Patrol Senior Volunteer Program. | |
| CERTIFICATION | |
| I hereby certify that there are no willful misrepresentations, omissions or falsifications in the foregoing statements and answers to questions, and that all statements and answers are true and correct to the best of my knowledge and belief. | |
| SIGNATURE <i>(sign in ink)</i> | DATE |

APPLICANT DRUG HISTORY QUESTIONNAIRE

| SUBSTANCE | LAST USED / TRIED | HOW INGESTED (Orally, Ingested, Smoked, Snorted, Inhaled) |
|---|-------------------|--|
| Marijuana (grass, pot, mota, weed) | | |
| Hashish/Hash Oil | | |
| Quaaludes (ludes) | | |
| Inhalants (popper, glue, gas, paint, solvents, cleaners) | | |
| Non-Prescribed Anabolic Steroids (d-bol, roids, juice, pump) | | |
| Barbiturates (barbs, candy, downers, reds) | | |
| Amphetamines/Methamphetamines (uppers, speed, crank, bennies, whites, cross tops, ice, crystal) | | |
| Cocaine (crack, coke, snow, rock, hubba, nose candy) | | |
| P.C.P. (angel dust, juice, crystal, rocket fuel, KJ, sherm) | | |
| Thai Sticks (opiate, grass) | | |
| Heroin (black tar, chiva) | | |
| Opium | | |
| LSD (acid) | | |
| Psilocybin (magic mushrooms) | | |
| Mescaline/Peyote (buttons) | | |
| Non-Prescribed Valium, Tranquilizers, muscle relaxers, sleeping pills | | |
| Illegal use of any prescribed drug (explain) | | |

Are there any drugs, narcotics or substances not on the above list that you have tried, used, or experimented with? ☐ Yes ☐ No

PRINTED NAME

DATE

SIGNATURE

Volunteer Email Application: Huntington Beach Public Library



7111 Talbert Avenue, Huntington Beach, California 92648
(714) 842-4481

Volunteer Application

| | | |
|-----------------------|----------------------|-------------------|
| Name | Date | |
| Street Address | City | |
| Zip Code | Email Address | |
| Home Phone | Work Phone | Cell Phone |

Please select: 18 years or older

12-17 years old

Number of hours you would like to volunteer per week:

Days and times of availability: Mon.

Tues.

Wed.

Thurs.

Fri.

Sat.

Sun.

Volunteer work preference:

Please refer to the volunteer opportunities brochure for job descriptions. (Mark indicating 1st, 2nd, and 3rd choices)

Children's

Friends of the Library

Circulation

Genealogy

Computer Coach

Grandparents and Books

Family Literacy (Oak View)

Homework Club

Friends Gift Shop

Literacy (Central)

Friends of the Children's Library

Used Book Sale

Select preferred library location:

Central Library
Branch

Main Street Branch
Oak View Branch

Banning Branch

Helen Murphy

List special training, skills set or certifications:

Previous volunteer experience:

List where and duties performed

List special training, skills set or certifications:

Health limitations/restrictions:

Emergency contact:

Name

Relationship

Home Phone

Work Phone

Cell Phone

References: List two (2) references other than family members

Name

Phone

Relationship

Years known

Street Address

City

Zip Code

Email Address

Name

Phone

Relationship

Years known

Street Address

City

Zip Code

Email Address

Thank you for your interest in volunteering for the Huntington Beach Public Library. Every effort will be made to accommodate your first choice of volunteer assignments. If you have questions, please contact Monica Miltko 714.375.5114.

Signature

Date

(for office use only)

Received by _____ Date _____

Division _____ Assigned Yes ☐ No ☐

Notes

Division _____ Assigned Yes ☐ No ☐

Notes

1. Emergency Contacts Sample Form

EMERGENCY CONTACT FORM

| LAST NAME | FIRST NAME | HOME PHONE |
|-----------|------------|------------|
|-----------|------------|------------|

IN CASE OF EMERGENCY, PLEASE CONTACT THE FOLLOWING PERSON:

| | |
|-----------------------------------|-----------------------------------|
| 1. _____ NAME | 1. _____ NAME |
| 2. _____ PLACE OF EMPLOYMENT | 2. _____ PLACE OF EMPLOYMENT |
| 3. _____ ADDRESS | 3. _____ ADDRESS |
| 4. _____ CITY ZIP | 4. _____ CITY ZIP |
| 5. _____ HOME PHONE WORK PHONE | 5. _____ HOME PHONE WORK PHONE |
| 6. _____ RELATIONSHIP | 6. _____ RELATIONSHIP |

5. Pre-Designation of Personal Physician: California Department of Parks and Recreation

DISTRIBUTION:

Original - Personnel File
Copy - Supervisor
Copy - Employee



State of California - The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

EMPLOYEE'S/VOLUNTEER'S PRE-DESIGNATION OF PERSONAL PHYSICIAN

In the event you sustain an injury or illness related to your employment, you may be treated for such injury or illness by your personal medical doctor (M.D.), doctor of osteopathic medicine (D.O.) or medical group if:

- The doctor is your regular physician who is either a physician who has limited his or her practice of medicine to general practice, or a board-certified or board-eligible internist, pediatrician, obstetrician-gynecologist, or family practitioner, and has previously directed your medical treatment and retains your medical records. Your "personal physician" may be a medical group if it is a single corporation or partnership composed of licensed doctors of medicine or osteopathy, which operates an integrated multispecialty medical group providing comprehensive medical services predominantly for nonoccupational illnesses and injuries;
- Prior to the injury your doctor agrees to treat you for work injuries or illnesses; **and**
- Prior to the injury you provided the Department with the following in writing: (1) notice that you want your personal doctor to treat you for a work-related injury or illness, and (2) your personal doctor's name and business address.

You may use this form to notify the Department if you wish to have your personal medical doctor or a doctor of osteopathic medicine treat you for a work-related injury or illness and the above requirements are met.

| | | |
|---|-------|-------------------------|
| EMPLOYEE PRINTED NAME (First, MI, Last) | | |
| DIVISION | | SECTION/DISTRICT/SECTOR |
| If I have a work-related injury or illness, I choose to be treated by the following physician: | | |
| PHYSICIAN'S PRINTED NAME AND TITLE (M.D. or O.D.), OR MEDICAL GROUP | | PHONE NO. () |
| STREET ADDRESS | | CITY/STATE/ZIP CODE |
| EMPLOYEE SIGNATURE  | | DATE |
| I agree to this predesignation. | | |
| PHYSICIAN SIGNATURE OR SIGNATURE OF DESIGNATED EMPLOYEE OF PHYSICIAN/MEDICAL GROUP* | | DATE |
|  | | |
| FOR ADMINISTRATIVE USE ONLY | | |
| RECEIVED BY | TITLE | DATE RECEIVED |

* The physician is not required to sign this form; however, if the physician or designated employee of the physician or medical group does not sign, other documentation of the physician's agreement to be predesignated will be required pursuant to Title 8, California Code of Regulations, Sections 9780.1(a)(3) and 9783.

C. Background Checks

Volunteer Confidential Information for Volunteers Requiring Background Checks: California Department of Parks and Recreation



State of California – The Resources Agency
DEPARTMENT OF PARKS AND RECREATION


VOLUNTEER CONFIDENTIAL INFORMATION

This form is to be completed by all campground hosts, or by volunteers whose duties require background checks (e.g., handling sums of money, holding positions of special trust or security, having control over minors, working with interpretive collections, or having access to law enforcement records/communications, etc.). Completed forms must be processed as confidential personnel documents.

| | | | |
|--|--|---------------------|---------------------|
| NAME (First, MI, Last) | | HOME PHONE NO. | ALTERNATE PHONE NO. |
| HOME ADDRESS | | CITY/STATE/ZIP CODE | |
| SOCIAL SECURITY NO. | DRIVER LICENSE OR ID CARD INFORMATION No.: _____ State: _____ | | BIRTHDATE |
| <i>I hereby authorize representatives of the California Department of Parks and Recreation to perform a background check. I certify that all information on this form is true and complete. I understand that omission or falsification of requested information may result in rejection or termination from volunteer services.</i> | | | |
| VOLUNTEER SIGNATURE | | DATE | |
| PRIVACY NOTICE | | | |
| Information provided by volunteers is afforded confidentiality under the Information Practices Act, Civil Code Section 1798.17, which also provides each individual with the right to review personal information maintained by this agency unless exempted by law. | | | |
| AGENCY: California Department of Parks and Recreation | | | |
| TITLE OF OFFICIAL RESPONSIBLE FOR MAINTENANCE OF INFORMATION: District Superintendent/Division Chief/Section Manager/Supervisor, as appropriate. | | | |
| AUTHORITY FOR MAINTENANCE OF INFORMATION: California State Government Volunteers Act, California Government Code Section 3110. et seq. | | | |
| ALL REQUESTED INFORMATION IS MANDATORY EXCEPT AS NOTED BELOW. | | | |
| CONSEQUENCES OF NOT PROVIDING ALL OR ANY PART OF THE REQUESTED INFORMATION: Placement as a State Parks Volunteer will not be possible. | | | |
| PRINCIPAL PURPOSE(S) WITHIN THE AGENCY FOR WHICH THE INFORMATION WILL BE USED: To allow for background checks when required for specific volunteer positions. | | | |
| KNOWN OR FORESEEABLE DISCLOSURES OF THE INFORMATION [CIVIL CODE SECTION 1798.24(e) OR (f)]: Department Audits Office | | | |
| SOCIAL SECURITY NUMBER | | | |
| Providing the Social Security number is voluntary in accordance with the Privacy Act of 1974 (PL93-579). However, if the Social Security Number is not included, the Department of Parks and Recreation will be unable to place the volunteer. | | | |


D. Use of Vehicles

2. Government Agency Request for Drivers License/ID Record Information

|  GOV'T AGENCY REQUEST FOR DRIVER LICENSE/IDENTIFICATION RECORD INFORMATION RETURN TO: DEPARTMENT OF MOTOR VEHICLES, P.O. BOX 944231, MAIL STA. G201, SACRAMENTO, CA 94244-2310 | | | |
|--|---|--|---|
| 1. REQUESTER CODE <div style="border: 1px solid black; padding: 2px; margin-top: 5px;"> (LAST FIRST MIDDLE) </div> | 2. SUBJECT DL/ID NUMBER <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div> | 3. BIRTHDATE MO. / DAY / YR. <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div> | 4. Information Requested <input type="checkbox"/> Status and Record <input type="checkbox"/> Certified <input type="checkbox"/> Order of Susp/Rev <input type="checkbox"/> Other <input type="checkbox"/> Proof of Service <input type="checkbox"/> Copy DL 44 |
| 7. ADDRESS <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div> | | 6. CITATION DATE <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div> | 8. COURT DATE <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div> |
| CITY STATE ZIP CODE | 9. REQUESTED INFORMATION NEEDED BY (DATE) * <div style="border: 1px solid black; height: 20px; margin-top: 5px;"></div> | | |
| <small>*Please submit the record request two weeks prior to the date needed. Otherwise, you may not receive the record information by the specified date. Each INF 254 Request Form must contain your return address (limited to 4 lines with no more than 35 characters per line) clearly entered below.</small> | | | |
| 11. Attn: _____ From: <div style="border: 1px solid black; padding: 5px; width: 150px; float: left; margin-top: 10px;"> . . </div> | | 10. REQUEST FOR SPECIFIC COPY OF ORDER OF SUSPENSION OR REVOCATION 1. Effective date: _____ 2. Effective date: _____ 3. Effective date: _____ We are returning the enclosed request form(s) for the reason(s) checked below: <input type="checkbox"/> No record based on information submitted and/or illegible. <input type="checkbox"/> Requested documents purged. <input type="checkbox"/> Requested documents not on microfilm. <input type="checkbox"/> Suspension/Revocation and/or service order unavailable. Please resubmit in _____ days. <input type="checkbox"/> Best DL 44 available. <input type="checkbox"/> No DL 44 available. <input type="checkbox"/> No departmental action in effect. <input type="checkbox"/> No departmental action in effect on citation given. <input type="checkbox"/> No DL 44 available on "X" file records. <input type="checkbox"/> Your INF 254 request form must contain your requester code number, agency name, and return address. <input type="checkbox"/> Upon checking departmental files, a hard copy document is unavailable. A certified driver record has been provided in lieu of the Admin Per Se Order of Suspension. <input type="checkbox"/> As of March 1, 1988, the only record of Financial Responsibility and Civil Judgment suspension orders will be in the Driver License Master files for each affected subject. Initials/Unit _____ Date _____ | |
| <small>INF 254 (REV. 10/97) (CA ST-RKS, EXCEL 9/19/2000)</small> | | | |
| DISTRIBUTION: Original + Copy to Department (Copy returned with record information) | | | |
| COMPLETING THE INF 254 FORM INSTRUCTIONS | | | |
| 1. Requester Code Enter the requester code assigned to your agency. <i>This code number is required on all requests.</i> | 8. Court Date Indicates the information being requested is connected with a pending court date and determines priority. | 9. Requested Information Needed by (Date) Information requests will require a minimum of ten (10) days processing in addition to four (4) days for mailing (14 days). Complete this box if the information is needed by a specific date. The department will make every attempt to accommodate you. | |
| 2. License/ID Number Enter the permanent California driver license/identification card number, including the single letter prefix. | 10. Request for specific copy of Order of Suspension or Revocation. | | |
| 3. Birth Date Use a six digit numerical form for the birth date. For example, enter February 25, 1950 as 02/25/50. The birth date is required for identification purposes on requests submitted without the driver license number. | 11. From The requesting agency's name and address is required in this space on each INF 254 form submitted. Your agency's address on the request form must be limited to a maximum of four lines and no more than 35 spaces per line. On the first line, a single "Attention" line may be added if needed to designate a particular person or unit within your agency. U.S. Postal Service requires that city, state and zip code must be last visible line in the address block. If your address has changed, please follow the instructions in Chapter 1, Section 1.001. | | |
| 4. Information Requested The "Status and Record" box must be checked to request a record printout. <i>The remaining items listed are furnished only to meet special needs.</i> | 5. Name (Required) Enter the subject's full name. Please avoid the use of abbreviations or initials if the full spelling is known. | | |
| 6. Citation Date Use this box to indicate the applicable date when requesting a copy of an order or a service document. | 7. Address Enter the subject's most complete/recent address available. | | |
| <div style="float: left; width: 40%;"> DEPARTMENT OF MOTOR VEHICLES MAIL STATION G201 P.O. BOX 944231 SACRAMENTO, CA 94244-2310 </div> <div style="border: 1px solid black; padding: 5px; width: 50%; margin-left: 10px;"> Example ATTENTION LINE (OPTIONAL) AGENCY NAME STREET ADDRESS/PO BOX NUMBER CITY, STATE AND ZIP CODE </div> | | | |

E. Use of State Equipment

3. Equipment Operators Qualification Card: California Department of Parks and Recreation

| Equipment Operators Qualification Card | | | | | |
|---|-----------------|--|-------|------|--|
| Keep this card in your possession and if lost notify issuing authority. This is to certify that _____ has satisfactorily completed the required equipment-operation training course and is authorized to operate Department of Parks and Recreation equipment as endorsed on the reverse side of this card. | | EQUIPMENT ITEM | INCL* | DATE | EVAL. BY |
| | | | | | |
| | | | | | |
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| | | | | | |
| | | | | | |
| | | | | | |
| LICENSE CLASS A B C M1 M2 | EXPIRATION DATE | | | | |
| SIGNATURE AND DATE | | | | | |
| TITLE | | | | | |
| TYPICAL EQUIPMENT ITEM ENTRIES USE DEPARTMENT EQUIPMENT LIST AS A GUIDE PU ½, ¾, etc. (PICKUP TRUCK ½, ¾ etc.) SED, STW (SEDAN, STATION WAGON) TSP GBGPK 10 CY (TRUCK 10 CY PACKER) DMP TRUCK 4 CY (4 CY DUMP TRUCK) UTL TRUCK ¼ (UTILITY, JEEP etc.) TRCTR WH 30, 35, 50 (WHEEL TRACTOR__HP) TRCTR CRLR 30, 35, 50 (CRAWLER TRACTOR__HP) TRLR 10T (10 TON TRAILER)  | | | | | |
| | | | | | |
| | | | | | |
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| | | | | | |
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| | | | | | |
| EQUIPMENT OPERATORS QUALIFICATION CARD | | * AB AIR BREAKS AT AUTO. TRANS. HST HOIST/LIFT W WINCH BH BACKHOE DPR 151 (Rev. 10/2000) | | | T4 4-SPD. TRANS. 4A2 REAR AXLE 2S LS LIMITED SLIP LDR LOADER TRL TRAILER DMP DUMP |
| | | OSP 0048996 | | | |

4. State Property or Equipment Issue: California Department of Parks and Recreation

DISTRIBUTION:
Original – Supervisor
Copy – Employee/Volunteer

State of California – The Resources Agency
DEPARTMENT OF PARKS AND RECREATION

STATE PROPERTY/EQUIPMENT ISSUE RECORD (See DAM Chapters 0200 and 1000)

The Supervisor completes and the employee/volunteers signs this form the first day the employee/volunteer is issued State property. As subsequent property is issued, the Supervisor updates this form and the employee/volunteer initials for each additional item assigned. When property is returned, the Supervisor dates and initials each item to acknowledge receipt.

NOTE: Upon an employee's separation or transfer, a copy of this form reflecting the return of all items issued must be attached to the DPR 213, Separation/Transfer/Promotion Information and Checklist.

| EMPLOYEE/VOLUNTEER NAME | | REPORTING UNIT NAME | | POSITION NO. | |
|-------------------------|-----------------------|---------------------|--------------|---------------|----------------|
| SUPERVISOR NAME | | TITLE | | DATE | |
| ITEM | DESCRIPTION OR NUMBER | DATE ISSUED | EMP INITIALS | DATE RETURNED | SUPVR INITIALS |
| Identification Card | | | | | |
| Keys | | | | | |
| Building Pass | | | | | |

State Property or Equipment Issue: California Department of Parks and Recreation (continued)

| | | | | | |
|---|--|--|--|--|--|
| American Express Travel Card | | | | | |
| CAL-Card | | | | | |
| Fuel Credit Card | | | | | |
| Phone Credit Card | | | | | |
| Cellular Phone | | | | | |
| Pager | | | | | |
| Laptop Computer | | | | | |
| Personal Digital Assistant | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| <p><i>I hereby acknowledge receipt and assignment of the State property listed above, and understand that I am responsible for the care and return of said items in good condition:</i></p> <p>EMPLOYEE/VOLUNTEER SIGNATURE _____ DATE _____</p> | | | | | |

F. Termination

5. Exit Interview: California State Government

State Volunteer Program *Exit Interview*

Managing a volunteer program is very challenging. One of the most difficult program management tasks is retaining long term volunteers. In order to help us in our ongoing assessment of the volunteer programs strengths and weaknesses, we ask that you answer the following questions. Please be truthful and forthcoming in your remarks; they will remain confidential and the information will be used only for our future management evaluations of the volunteer program.

Name _____ Unit _____ Date _____

How long were you a volunteer? _____

What kinds of volunteer positions did you hold? _____

Did you find that our initial and ongoing training was adequate for your position? If not, please explain _____

What did you like most about being a volunteer? _____

What do you feel are the strengths of the volunteer program? _____

In what ways can our volunteer program use improvement? _____

Overall, how would you rate your enjoyment in being a volunteer? (1 = poor / 10 = excellent)

1 2 3 4 5 6 7 8 9 10

Would you ever consider returning as a volunteer, and why or why not? _____

Would you consider being "on call" for future special events? _____

Please submit your completed form to: _____

APPENDIX II

EXAMPLES POLICIES AND OTHERS

A. Volunteer Status of Individuals

Former Departmental Employees Sample Policy

A former agency/department employee may provide volunteer services under the following conditions:

- a. The former employee has been clearly separated from the agency/department for at least one full pay period. Note: This requires that actual time worked employees are formally separated from state service, and not just “inactive.”
- b. The former employee should not, to the extent possible, be assigned to volunteer duties that they previously performed or could have performed while employed by the agency/department.
- c. No department supervisor or manager should coerce or pressure any former employee to provide volunteer services. A superintendent who accepts volunteer services from a former employee should inform the former employee that the department may not provide preferential treatment in any hiring decisions.
- d. Volunteers, whether former employees or new hires, should cease providing volunteer services one full pay period prior to applying for or being hired for any position with the department.
- e. Any former employee now volunteering who is residing in state housing should be subject to the same lease requirements as any other volunteer residing in state housing.
- f. If a former employee offers to perform volunteer services for the agency/department, the offer should be referred to the designated department representative, as defined in the section Registering Volunteers. The agency/department representative should determine whether to accept volunteer services. If the representative is uncertain whether the agency/department may properly accept the volunteer services, she/he should discuss this matter with the respective supervisor.

Note:

Each agency/department should determine its own policy regarding former departmental employees. Please see appendix for an example of how to form such policy.

B. Insurance

Group Insurance Sample Policy: California Department of Parks and Recreation

- a.** The certificate of insurance should be:
- b.** Written in a form acceptable to the department.
- c.** Written by an insurer acceptable to the department.
- d.** Maintained at the sole expense of the group.
- e.** In full force for the complete term of the *Volunteer Group Services Agreement*.
- f.** Primary, and not in excess to any insurance carried by the department.
- g.** Prepared on an appropriate agency/department form or a certified copy of the original policy, including all endorsements.

C. Registering Volunteers

1. Short Term Volunteers Sample Policy: California Department of Parks and Recreation

Short-term individual adult volunteers are registered using the *Special Project or Activity Sign-In* <http://www.parks.ca.gov/pages/642/files/copy%20of%20dpr208g.pdf>. The designated department representative should take the following steps when registering short-term individual volunteers:

- Ensure that the disclaimer information on the *Special Project or Activity Sign-In* is available to all volunteers, either as handouts or copies posted in central locations.
- Instruct each volunteer to read the disclaimer information on the *Special Project or Activity Sign-In* form.
- Read aloud to the prospective volunteers, either individually or as a group, the entire disclaimer text printed on the *Special Project or Activity Sign-In* form.
- Instruct each volunteer to print and sign his or her name on the sheet.
- Provide an opportunity for each participant to ask questions.

2. Long Term Volunteers Sample Policy: California Department of Parks and Recreation

The designated department representative should follow these procedures when registering long-term individual volunteers:

- Have the volunteer complete the top portion of the *Volunteer Service Agreement* along with the Emergency Notification section. (The volunteer's social security number, driver's license number, and date of birth should not be requested unless required, such as for a criminal history or driving record check. Personal Confidentiality - <http://www.leginfo.ca.gov/calaw.html>, Civil Code, 1798.24 - 1798.24b.)
- Review the service agreement with the volunteer, including work location and position description
- Have the volunteer and the designated department representative sign the *Volunteer Service Agreement*.
- Photocopy the Volunteer Service Agreement and the job description for the volunteer.
- Attach the original position description to the *Volunteer Service Agreement* and file in secure file. Utilize the periodic evaluation summary to record the volunteer's performance and to document changes in the volunteer's assignment.

Note: If a background check is to be done, the department representative should not sign the *Volunteer Service Agreement* until the health and background checks are completed.

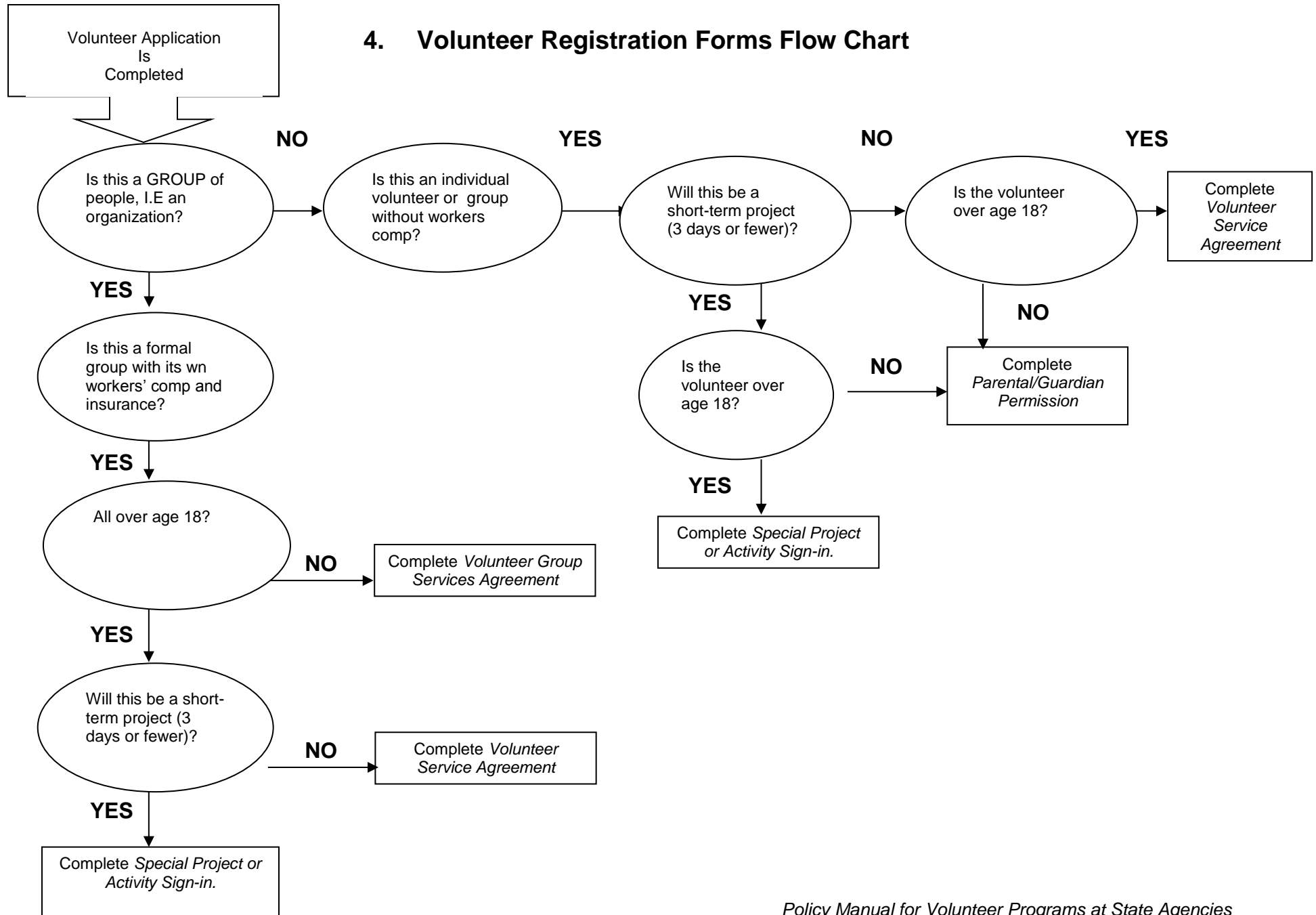
3. Youth Volunteers Sample Policy: California Department of Parks and Recreation

Individual juveniles should complete the *Volunteer Service Agreement* and the *Parental/Guardian Permission*. Juveniles who are siblings may be registered on a single *Parental/Guardian Permission*. Groups of juvenile volunteers are registered using the *Group Volunteer Services Agreement*, and should attach a roster of all participants with names, addresses, and phone numbers.

The district should determine minimum age requirements for specific tasks, hours of service and when a parent or guardian presence is required. *Parental/Guardian Permission* is required except when an organized group assumes responsibility for obtaining parental/guardian permission and registers the group using the *Volunteer Group Services Agreement*. A supervisor or program leader should approve the *Parental/Guardian Permission*. Work permits are recommended, although not required.

Juveniles who arrive in a state park with adults who are not their parents or legal guardians should not be allowed to participate in volunteer activities without the written permission of a parent or legal guardian.

4. Volunteer Registration Forms Flow Chart



D. Orientation

1. Orientation Checklist: California Department of Parks and Recreation

Summary of Volunteer Forms

Individuals

Volunteer Application

Recommended for long-term volunteers. It provides general background and skill information for appointment and initial evaluation purposes. Each agency/department should develop their own standard volunteer application and consider making position-specific applications as well.

Volunteer Service Agreement (VSA)

Should be required for all long-term volunteers. This is the primary registration form and can be combined with a duty statement. It is the closest an agency/department can get to a contract for volunteers. It is also used to document volunteer separation/termination.

Special Project or Activity Sign-In

<http://www.parks.ca.gov/pages/642/files/copy%20of%20dpr208g.pdf>

Should be required for individuals volunteering for three days or less. Do not use for juveniles (individuals under age 18).

Groups

Volunteer Group Services Agreement

<http://www.parks.ca.gov/pages/642/files/copy%20of%20dpr208b.pdf>

Should be required for groups and organizations with liability insurance coverage. This may be used for either short-term or long-term projects and for groups with juveniles.

Special Project or Activity Sign-In

<http://www.parks.ca.gov/pages/642/files/copy%20of%20dpr208g.pdf>

Should be required for groups without liability insurance coverage. This form is used for short-term projects only and may not be signed by juveniles. Each participant signs the form.

Juveniles

Parental/Guardian Permission

<http://www.parks.ca.gov/pages/642/files/copy%20of%20dpr208b.pdf>

Should be required for all juveniles (individuals under the age of 18) for participation in any short-term or long-term volunteer projects or programs, unless they are covered by the *Volunteer Group Services Agreement*.

Medical Forms

Employee's / Volunteer's Notice of Pre-Designated Physician

Recommended for all long-term individual volunteers, so that they can designate their own physician in case of accident/emergency (see sample forms under "Medical Forms").

Essential Functions Health Questionnaire

<http://www.parks.ca.gov/pages/618/files/SBSP%20STD%20910.pdf>

Should be required for all long-term individual volunteers to determine their general health and physical capabilities (see sample forms under "Medical Forms").

Criminal History and Background Check Forms

The following forms should be required for volunteers whose duties involve handling sums of money, holding positions of special trust or security, having control over minors, working with special collections, or having access to law enforcement records/communications, etc. Note: If a background check is to be done, the department representative should not sign the *Volunteer Service Agreement* until the check is complete.

Each agency/department should determine its own policies regarding background checks.

Volunteer Confidential Information Form

Pre-Employment Arrest/Conviction Disclosure Statement

Request for Live Scan Service

http://ag.ca.gov/fingerprints/forms/all_others.pdf

(BCII 8016)

http://ag.ca.gov/fingerprints/forms/BCII_8016.pdf

http://ag.ca.gov/fingerprints/forms/BCII_8016A.pdf

Volunteer Equipment Usage Forms

The following forms should be required if driving is part of the duties listed on the volunteer's duty statement:

Government Agency Request for Driver's License/Identification Record Information (STD 254) Contact the California Department of Motor Vehicles for the appropriate form for your agency/department. See sample form from the California Department of Parks and Recreation.

Authorization to Use Privately Owned Vehicles on State Business (STD 261)

<http://www.documents.dgs.ca.gov/osp/pdf/std261.pdf>

Should be required before a volunteer can use a privately owned vehicle for State business. It is valid only for business specifically authorized by the designated agency/department representative and listed on the volunteer's duty statement.

Equipment Operators Qualification Card

Required to help ensure proper training prior to the operation of any State vehicle or equipment.

Accident Reporting Forms

Accident Report (Other than Motor Vehicle) (STD268)

<http://www.documents.dgs.ca.gov/osp/pdf/std268.pdf>

Vehicle Accident Report (STD 270)

<http://www.dot.ca.gov>

Submit these official State of California forms to the address listed and within the specified window of time.

Travel Expense Claims

If the volunteer will be reimbursed for travel expenses and per diem allowances, reimbursement must be listed on the duty statement. The following forms should be required of the volunteer:

Travel Expense Claim (STD 262)

<http://www.documents.dgs.ca.gov/osp/pdf/std262A.pdf>

Payee Data Record (STD 204)

<http://www.documents.dgs.ca.gov/osp/pdf/std204.pdf>

Oath of Allegiance (STD 689)

<http://www.documents.dgs.ca.gov/osp/pdf/std689.pdf>

2. Program Coordinator Roles/Reporting Structure

Volunteer Programs Coordinator

In an ideal set-up, an agency/department should designate a volunteer program coordinator to oversee all volunteer program activities in the agency and associated departments or in the department and associated units.

Example: California Department of Parks and Recreation

The Volunteer Programs Coordinator in the Interpretation and Education Division serves as the statewide coordinator of the department's Volunteers in Parks Program (VIPP).

Departmental Volunteer Coordinator

Each department should then designate a department representative to manage and supervise volunteer programs at the appropriate level. Government Code Section 3119 requires that departments "provide sufficient staff for the effective management and development of volunteer programs."

District Volunteer Coordinator

Division chiefs/district superintendents/section managers designate the district volunteer coordinator and specify volunteer coordinator duties in the employee's job description. The district volunteer coordinator will:

Plan, direct and oversee the volunteer program.

- Coordinate volunteer program leaders' activities, including recruitment, screening, and required training of volunteers.
- Coordinate the volunteer recognition program.
- Compile and report the annual volunteer activity reports to the state volunteer programs coordinator in the Interpretation and Education Division.
- Apprise the chief/superintendent/section manager of all program activities, relevant problems, and personnel issues.

Each district volunteer coordinator should submit an Annual Volunteer Activities Program Report, which will include a district summation of their respective volunteer programs. The report should be submitted on a specific departmental form or on a computer-generated report of similar format.

Sector or Unit Volunteer Coordinator

Volunteer coordinators at the sector or unit level often have the lead responsibility for volunteer recruitment, orientation, training, scheduling, record keeping, performance evaluation and recognition. The sector or unit volunteer coordinator serves as the primary representative for meeting the requirements of Government Code §3119 (a) (b) and (c). (Refer to Appendix III.A.3) As specifically delegated by the division chief/district superintendent/or section manager, the volunteer coordinator should:

- Maintain a close working relationship with the district volunteer coordinator.
- Ensure that all volunteers complete the required administrative forms.
- Prepare volunteer job descriptions for approval by a supervisor.
- Maintain volunteer records and statistics to be reported to the district volunteer coordinator annually or as required.

Volunteer Supervisor

Although nonsupervisory staff may provide most of the actual day-to-day oversight of a volunteer program, a designated department supervisor should accomplish supervisory-specific jobs such as hiring, firing, and providing formal performance appraisals.

Volunteer Lead Person

Where appropriate, a volunteer may act as a unit volunteer coordinator, provided the volunteer is under the direct supervision of a paid staff member and maintains close communication. It is recommended that the volunteer lead person and supervisor attend the department's volunteer management training when offered.

Program Roles/Reporting Structure: California Libraries "Best Practices"

3. Program Roles/Reporting Structure: California Libraries “Best Practices”

| Responsibilities | Library Director | Volunteer Manager | Staff |
|-------------------------------------|---|---|---|
| Planning | <ul style="list-style-type: none"> • Ensure development of a Volunteer Mission or Philosophy Statement for the organization, and ensure staff understands its importance. • Be visible in the planning process. • Ensure sufficient staff, financial and other resources are committed to the program. • Provide time for staff to be involved in planning, and to get the training they need in volunteer management. • Involve director of volunteers in future organization-wide planning. | <ul style="list-style-type: none"> • Involve staff in the planning process. • Develop goals and objectives for the program, monitor progress, and make periodic reports to management and staff. | <ul style="list-style-type: none"> • Actively participate in planning process and training programs. • Maintain an open mind. |
| Volunteer Program Management | <ul style="list-style-type: none"> • Insist on having volunteer job descriptions in writing. • Make sure department heads understand the importance of their role in creating a successful volunteer program, and that volunteers are everyone’s responsibility, not just the director of volunteers. • Include responsibility for training and supervising volunteers in staff job descriptions and performance evaluations. • Be visible at volunteer orientation and recognition events. • If properly documented, support the director of volunteers’ decisions to not accept, reassign or terminate a volunteer. • Set an example by having volunteers directly assigned to you. | <ul style="list-style-type: none"> • Work with appropriate staff to identify and develop meaningful jobs for volunteers that will assist the Library in achieving its goals. • Manage the recruitment, interviewing, selection and placement of volunteers based on defined job descriptions. • Develop and oversee delivery of training and consultation programs for staff to ensure their acceptance and understanding of the volunteer program and to develop the skills needed to successfully carry out their critical role. • Ensure that sufficient written policies and procedures are in place for Volunteer Services, and periodically review them to ensure continued relevance. • Develop appropriate recognition programs for volunteers. • Set an example by having volunteers directly assigned to you. | <ul style="list-style-type: none"> • Participate in the development of meaningful job descriptions for volunteers. • Participate in training programs to enhance skills in volunteer management. Ask for additional training on specific issues as needed. • Provide supervision, feedback and performance evaluation for volunteers as requested. • Help volunteers feel welcome, appreciated, and part of a team. |

| | | | |
|---|--|--|---|
| Public Relations and Recruitment | <ul style="list-style-type: none"> • Ensure that the volunteer program and opportunity to volunteer is mentioned in organizational materials and in speeches you make to community groups. • Include data on the volunteer program in reports you make to the Board, to funders and in your annual report. • Invite the Director of Volunteers to accompany you to community events where recruitment might be possible. • When requested, utilize your Board and community contacts to assist with volunteer recruitment. | <ul style="list-style-type: none"> • Keep Director and Staff informed of volunteer success stories and recruitment needs. • See that “inviting” volunteer recruitment materials are developed and distributed through appropriate channels. • Serve as liaison to the local Volunteer Center, Corporate Volunteer Council and other organizations which can assist in making contacts for your volunteer program. | <ul style="list-style-type: none"> • Keep eyes open both inside and outside the organization for potential sources of volunteers. • When requested, utilize your community contacts to assist with volunteer recruitment. |
|---|--|--|---|

Program Roles/Reporting Structure: California Libraries “Best Practices” (continued)

APPENDIX IV

WORKS CITED

4. Volunteer Job Description Sample Form:

California State Library
Web Wrangler (Social Media Liaison)
Volunteer Position Description

Position Overview and Impact:

Serve as a “community liaison” engaging users in a new online social media community for and about Baby Boomers and public libraries – Transforming Life After 50 (TLA50). Facilitate the participation of library professionals and others interested in exploring ideas and practices that better serve and involve active, older adults.

Key Responsibilities:

2. Responsibly monitor online conversations and engage TLA50 social media users: suggesting topics, sharing information, answering questions, identifying opportunities in user generated content, and referring inquiries, as appropriate, to project staff.
3. Seek out new related communities and tools with which to connect.
4. Encourage and recognize users who positively engage and contribute to these online communities.

Qualifications:

- Understanding of social media universe including Ning, Facebook, Twitter, YouTube, Forums, Wikis, and blogs
- Reliable access to a computer and the Internet.
- Excellent verbal and written communication skills.
- Ability to work independently but as a part of an organizational team.
- Well organized and able to meet deadlines.

Staff Volunteer Contact: Suzanne Flint

Training and Support Provided: In-person training from staff, including a HyperArts social media manual, will be provided to start. Training will also cover boomer background, content issues, and topics. Ongoing support and guidance will be provided throughout the volunteer assignment with regularly scheduled status updates.

Time Commitment: Check TLA50 sites daily (Monday-Friday) as your schedule permits and based on levels of participation for a total of 3-5 hours per week.

Length of Commitment: Six months.

Benefits of Volunteering: Be part of a new wave of library practice that will influence how people approach midlife for years to come while expanding your own social media expertise.

Contact Person: Suzanne Flint at sflint@library.ca.gov or 916-651-9796

CALIFORNIA CODE / CALIFORNIA EXECUTIVE ORDERS / NATIONAL ACTS

| State Policies | Source | Link |
|---|--|---|
| California Civil Code Personal Confidentiality | Civil Code §1798.24 – §1798.24b | http://www.leginfo.ca.gov/calaw.html |
| California Family Code Emancipated Minors | Family Code §7002 | http://www.leginfo.ca.gov/calaw.html |
| California Government Code California State Volunteers Act | Gov. Code §3110-§3112; §3113-§3117; §3118-§3119.2; §3119.5 | http://www.leginfo.ca.gov/calaw.html |
| California Government Code Public Records Act | Gov. Code §6250-§6252 | http://www.leginfo.ca.gov/calaw.html |
| California Government Code Equal Opportunity | Gov. Code §11135 | http://www.leginfo.ca.gov/calaw.html |
| California Government Code Unlawful Employment Practice | Gov. Code §12940a | http://www.leginfo.ca.gov/calaw.html |
| California Government Code Equal Opportunity | Gov. Code §18500 | http://www.leginfo.ca.gov/calaw.html |
| California Penal Code Equal Opportunity Terms Definition | Penal Code §422.56 | http://www.leginfo.ca.gov/calaw.html |
| California Vehicle Code California Vehicle Code Regarding Liability | Vehicle Code §17150; §17151 | http://www.leginfo.ca.gov/calaw.html |
| State Executive Orders | Source | Link |
| California Service Corps Executive Order | W-77-94 | http://www.leginfo.ca.gov/calaw.html |
| Secretary of Service and Volunteering Executive Order | S-02-08 | http://gov38.ca.gov/executive-order/8864 |
| California Volunteers Executive Order | S-24-06 | http://gov.ca.gov/news.php?id=4900 |
| Federal Policies | Source | Link |
| National Community Service and Trust Act of 1993 | | http://www.californiavolunteers.org/documents/About_Us/ncsa1990.pdf |
| Edward M. Kennedy Serve America Act | | http://www.nationalservice.gov/about/serveamerica/index.asp |
| | | |

California Volunteers. <http://www.CaliforniaVolunteers.ca.gov>.

“International Declaration on Volunteering.” *International Association for Volunteer Effort*. Sept. 2001. <http://www.iave.org>.

Lehn, Carla Campbell. *Volunteer Involvement in California Libraries: “Best Practices.”* <http://www.library.ca.gov/lds/getinvolved/docs/F-resources/VolunteerInvolvementInCaliforniaLibraries-BestPractices.pdf>

Sacramento: California State Library, 1999.

Office of the Attorney General. 2010. <http://www.ag.ca.gov>.

Senior Volunteer Program Manual. Sacramento: Department of California Highway Patrol, 2013.

“Volunteer Handbook: Helping you get the most out of your volunteering experience.” Adelaide, Australia: Central Volunteer Managers Network, 2008.

Volunteers in Parks: Program Guidelines. Sacramento: California State Parks, Interpretation and Education Division, 2005.

ADDITIONAL RESOURCES

Lehn, Carla Campbell. *Volunteer Engagement On-line Course.*
<http://transforminglifeafter50.org/tools-ideas/volunteers/volunteer-engagement-course> Sacramento: California State Library.