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## **I. POLICY SUMMARY**

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### **A. Purpose**

1. The purpose of this policy is to set forth official operational procedures for the participation of people as volunteers in the educational and research programs conducted by Cooperative Extension. This policy does not apply to volunteers in 4-H programs. Applicable 4-H policies are set forth in the 4-H Handbook.
2. "Formal" volunteers (see "Definitions"), as evidenced by issuance of an official volunteer appointment card, are designated as agents of the University of California. As agents of the University, these persons are accorded all rights, privileges, and protection inherent in the position. In addition, as agents of the University, formal volunteers are subject to all laws, policies, and regulations that govern the operations of Cooperative Extension and the University of California.
3. "Casual" volunteer involvement (see "Definitions") in Cooperative Extension programs does occur but does not result in the issuance of a volunteer appointment card or granting the designation of agent of the University. Such involvement may include, but is not necessarily limited to, the following activities:
  - a. Support for program or office operations.
  - b. Participation on Cooperative Extension advisory committees.
  - c. Cooperation with Extension personnel in conducting research or implementing educational activities as part of their normal employment or official duties.
  - d. Response to questionnaires or surveys undertaken by the Cooperative Extension.

Casual volunteers may not give out technical advice. In all instances, the designation as an agent of the University shall be reserved for persons issued a volunteer appointment card.

### **B. Authority, Responsibility, and Delegation**

1. The ultimate authority and responsibility for using volunteers in Cooperative Extension programs is vested in the Office of the Vice President--Agriculture and Natural Resources.
2. To ensure an efficient and effective volunteer effort, the Vice President has delegated authority and responsibility for implementation of this policy to County Directors.
3. In all instances, staff are responsible for ensuring that volunteer involvement in Cooperative Extension programs is conducted in accordance with stated missions and objectives of the University of California and Cooperative Extension and in accordance with all appropriate laws, policies, and regulations.

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## **II. DEFINITIONS**

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A **Cooperative Extension Volunteer** is anyone 18 years of age or older who agrees to provide a service or conduct an activity, on an unpaid basis, that supports the goals of a Cooperative Extension- sponsored program.

The following are two general types of volunteers:

The **casual volunteer** is one who offers, on an informal basis, to perform a specific task for a specific period, apart from an organized volunteer program.

The **formal volunteer** is one who is specifically recruited, oriented, trained, and certified by issuance of a volunteer appointment card as part of an organized volunteer program undertaken to achieve specific programmatic objectives.

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## **III. POLICY TEXT**

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### **A. Justification and Approval**

The County Director is responsible for all activities conducted by Cooperative Extension in the county, including the use of volunteers.

1. The County Director should be informed by the responsible advisor of the number, status, and role of casual volunteers for whom he or she is responsible.
2. County Directors must approve formal volunteer programs before recruitment. The advisor responsible for developing formal volunteer programs should provide the County Director with a written justification that identifies the needs, benefits, and costs of conducting the program, the number and type of volunteers to be recruited, the training to be provided, and the measures to be used to evaluate the volunteers and the overall program.

### **B. Formal Volunteer Role Descriptions**

1. Volunteers fill a variety of roles for Cooperative Extension. A basic written description should be developed to set forth duties and responsibilities of the volunteers, the organizational relationships, affirmative action concerns, and the required and desired qualifications.
2. People accepting appointments as Cooperative Extension volunteers must read and sign the description. A copy of the signed description should be given to the volunteer and a copy placed in the program files.

### **C. Recruitment**

1. The recruitment effort should be planned before conducting a formal volunteer program. It should take into account programmatic and affirmative action goals. To meet programmatic goals, the required qualifications, the nature of the training, and the expectations for volunteer service should be clearly stated in all recruitment materials such as announcements and flyers. To meet affirmative

action goals, appropriate media outlets and community organizations that support underserved audiences should be used.

2. Volunteers from other agencies (VISTA, etc.) may be used as appropriate. In such cases, policies of the agency must not violate the University or Cooperative Extension policies.

#### **D. Selection**

1. Selection of a person as a casual or formal volunteer should be based on program need, ability to perform the required tasks, and willingness to act in accordance with University policy. In all cases, selection should take into account the affirmative action goals and program policies.
2. When possible, a selection committee should be established to help ensure a balanced review of the strengths and weaknesses of each applicant and overall program needs.

#### **E. Orientation and Training**

1. Both casual and formal volunteers should be provided with an orientation to the organization, an explanation of supervisory relationships, procedures for evaluation, information on reappointment or termination, and complaint procedures.
2. Casual volunteers who will have public contact should be informed on all ongoing County activities.
3. Formal volunteers should be given a detailed orientation, emphasizing structure, goals, funding, duties and responsibilities, legal and organizational concerns, opportunities for involvement and further training, and specific expectations regarding performance.
4. Staff are responsible for ensuring that volunteers receive sufficient training to enable them to conduct the activities or provide the services the program has been designed to deliver and as specified in the position description. Staff should:
  - a. Develop the content of training programs before recruitment.
  - b. Establish procedures for determining minimum levels of proficiency.
  - c. Provide additional in-service training when feasible.

#### **F. Appointment, Recertification, and Termination**

1. County Directors have the authority to appoint volunteers.
  - a. The term of an appointment, which should not exceed 12 months, should be specified at the time of the appointment.
  - b. The official volunteer card will be issued at the time of appointment. A copy

- should be placed in program files.
2. Volunteers may be reappointed for additional terms as follows:
    - a. Reappointments should be made according to program needs and an evaluation of the volunteer's performance based on the volunteer's job description.
    - b. Reappointment may require recertification of subject- matter competency.
  3. A volunteer may be terminated for cause with the approval of the County Director. In all such cases, the Regional Director will be notified. The following are causes for termination:
    - a. Performance of an act that violates University policy will cause immediate termination.
    - b. Failure to meet the agreed upon responsibilities.
  4. Periodic evaluation of the overall volunteer program should be conducted to determine impact, effectiveness, and continued justification.

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## **IV. COMPLIANCE / RESPONSIBILITIES**

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### **A. Insurance**

#### 1. Liability

Formal volunteers serve as agents of the University and are protected by the same liability insurance coverage as University employees. This coverage prevails at all times when the volunteer is engaged in or traveling to or from official Extension activities.

If the volunteer is involved in any case where accidental injury or property damage occurs to others, the County Director must report full details promptly to the Budget and Financial Services Office. In case of death or serious injury, the County Director must immediately report by telephone to the Budget and Financial Services Office with as many details as possible. Procedures for reporting accidents involving volunteers are the same as those for reporting accidents involving employees (see Section 256 of the Handbook).

#### 2. Accident

Volunteers are not covered by Worker's Compensation insurance, and the University does not provide insurance for volunteers that covers personal injury or property loss.

### **B. Materials for Publication and Dissemination**

Volunteers may be involved in preparing press releases or other mass media materials for use in Cooperative Extension programs. When they are, the following

requirements will be observed.

1. All material must be reviewed by the appropriate Cooperative Extension Advisor to assure accuracy of information.
2. Recommendations on the use of pesticides or other controlled chemicals must be reviewed and approved by the Office of Pesticide Information and Coordination before publication (see Section 292).

### **C. Use of University Equipment**

Volunteers may use University equipment for official University activities. When equipment is used away from the county offices, formal check-out procedures must be followed.

### **D. Use of Facilities**

Volunteers responsible for organizing Cooperative Extension program events may have to obtain authorization to use a facility owned by a private party or public entity. If a signed agreement is required, it must be entered into in the name of "The Regents of the University of California." Procedures set forth in Section 241 should be followed.

### **E. Expenditures and Reimbursement**

Volunteers are not authorized to commit the University to expenditures. Any necessary purchases must be approved in advance by the County Director or designee.

### **F. Conflict of Interest**

Volunteers may be involved in University activities in which there might be a conflict of interest with their personal business. See Section 435 for information on conflict of interest situations. If there appears to be a possibility for a conflict of interest, the volunteer should discuss the matter with the County Director and if the Director determines that a conflict exists, the volunteer should not participate in the activity.

### **G. Use of University Name**

Volunteers are not authorized to use the name of the University of California or Cooperative Extension except when involved in an approved University activity.

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## **V. PROCEDURES**

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### **A. Complaint Procedure**

The following guidelines govern resolution of complaints about Cooperative Extension policies and programs, as they directly affect the volunteer.

1. Informal Review

Efforts should be made to resolve the volunteer's complaint on an informal basis

through discussion between the volunteer and the appropriate University representative.

## 2. Formal Review

- a. Efforts at informal complaint resolution are not mandatory, and a volunteer may choose to seek resolution through formal review. In such cases, the complaint must be received by the appropriate County Director within 30 calendar days after the date on which the volunteer could be expected to know of the event or action that gave rise to the complaint.
- b. In cases where informal review is attempted but does not resolve the complaint to the satisfaction of the volunteer, formal complaints should be received by the County Director within a reasonable time after the completion of the informal process. In most cases, "a reasonable time" should be 30 calendar days from the time at which all parties to the discussion have agreed that the complaint cannot be resolved
- c. Formal complaints shall be in writing, describing the specific nature of the complaint and the remedy requested.
- d. The County Director shall forward a copy of the complaint to the Regional Director and other appropriate administrators who need to know of the complaint.
- e. The County Director shall respond to the complaint with a written decision. The response should be made within 30 calendar days from the date of the receipt of the complaint.
- f. If the volunteer is not satisfied with the decision of the County Director, the volunteer may appeal the decision to the Regional Director. The appeal must be in writing and must state specifically the basis for the appeal. The Regional Director shall respond with a written decision. The response should be made within 30 calendar days from the date of the receipt of the appeal.
- g. If the volunteer is not satisfied with the decision of the Regional Director, the volunteer may seek review of the decision by the Vice President. The request for review must be in writing and must state specifically the basis for the request. The Vice President has sole discretion whether to accept or deny the request for review. If the request for review is denied, the decision of the Regional Director becomes final. If the Vice President accepts the request for review, the Vice President shall respond with a written decision, which shall be final. The response should be made within 30 calendar days from the date the request for review is accepted.
- h. The County Director, Regional Director, or Vice President (hereafter "Administrator") has discretion to decide what information or input from others would be of assistance in their respective reviews. Each may elect to seek

- assistance in the review of the volunteer's complaint by use of an independent party. The independent party will be selected by the Administrator and will undertake the review at the direction of the Administrator. The Administrator may use any report(s) of the independent party as is deemed appropriate in reaching a decision in the matter.
- i. Volunteers may elect to send complaints that are alleged to result from discrimination because of race, color, religion, marital status, national origin, sex, physical or mental handicap, or, within the limits imposed by law, because of age or citizenship, directly to the Secretary of Agriculture in Washington, D.C.
  - j. All matters and records relative to volunteer complaints will be treated as confidential.

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## **VI. RELATED INFORMATION**

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## **VII. FREQUENTLY ASKED QUESTIONS**

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## **VIII. REVISION HISTORY**

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**Month Year:**

What in the policy was revised?