



University of Missouri Extension

Volunteer Policy Manual for Staff

(Revised Oct. 19, 2017, Updated Jan. 23, 2019)

<http://extension.missouri.edu/hr/volunteers.aspx#gsc.tab=0>

University of Missouri Extension Volunteer Policy Manual for Staff

Adapted with permission from University of Maine Cooperative Extension

1. INTRODUCTION

a. Purpose of a volunteer policy manual

This policy manual provides a consistent framework and direction for faculty and staff working with volunteers within University of Missouri Extension programs. For brevity, this manual will use the term “staff” to refer to the extension employee responsible for the oversight of a program engaging volunteers. Used consistently, this policy manual will reduce volunteer risk and protect the interests of MU Extension, its staff, volunteers and the communities it serves. Volunteer policies help determine boundaries, clarify responsibilities, provide structure and ensure continuity.

b. Volunteer philosophy

Volunteers are key MU Extension partners, helping guide and deliver programs that matter to Missourians.

c. Definition of a volunteer

[Missouri Revised Statutes Section 537.118](#) (3) "Volunteer" — An individual performing services for a nonprofit organization or a governmental entity who is not compensated for his services on a salary or prorated equivalent basis. The term shall not include those covered by section [537.118](#).

[University of Missouri Rules and Regulations HR-513](#) "Volunteer," — In accordance with the Fair Labor Standards Act (FLSA), the University of Missouri considers a volunteer to be an individual who performs hours of service for the University for civic, charitable, or humanitarian reasons, without promise, expectation or receipt of compensation for services rendered.

To be considered an MU Extension volunteer, one must have completed:

1. Program enrollment or registration,
2. Documented agreement with the MU Extension Volunteer Code of Conduct,
3. Orientation to MU Extension and any program-specific orientation or training,
4. Background screening per policy for child abuse/neglect and criminal background convictions, if working with minors in an ongoing basis outside the classroom setting, and
5. Engaged in programs or assigned duties that are approved and supervised by extension staff.

d. What can volunteers expect?

Volunteering for MU Extension is a **privilege, not a right**. However, volunteers can expect the following:

- Identified volunteer role description with clear, appropriate assignment and expectations
- Screening and selection processes that are easy to understand
- Orientation to the MU Extension organization, vision, mission and policies
- Training specific to the volunteer role
- Supervision and support from staff
- Recognition of contribution
- Opportunity to share perspective of volunteer role and also program accomplishments and needs

2. CORE VALUES AND STANDARDS

Questions pertaining specifically to civil rights, accommodations and/or sexual harassment should be directed to the MU Civil Rights and Title IX Office at civilrights-titleix@missouri.edu or 573-882-3880.

a. Civil rights

All volunteers will be made aware of MU Extension statement on civil rights and their responsibilities to meet civil rights goals.

The University of Missouri Extension is committed to ensuring the civil rights of its volunteers, clients and employees. Every individual must be treated fairly and equitably, with dignity and respect. This policy applies to all volunteers, clients and employees, regardless of race, color, national origin, sex, sexual orientation — including transgender status or gender expression — religion, age, disability, genetic information, political beliefs, veterans status, citizenship, and marital or family status.

For more civil rights information, please visit the Title IX web site at <http://civilrights.missouri.edu> or contact Callie Glascock, Extension Budget Director and Interim HR Administrator, at glascockck@umsystem.edu or call 573-882-9016.

b. Nondiscrimination

University of Missouri Extension is committed to providing equity and access to all through the implementation of practices and procedures that ensure compliance with federal laws and university policies, and that enhance extension's capacity to serve the people of Missouri.

The text of the University of Missouri nondiscrimination statement is as follows.

Treat all youth and adults equally, without discrimination. This includes providing equal access to participation for all youth and adults, regardless of race, color, sex, pregnancy, national origin, ancestry, sexual orientation, gender identity, gender expression, religion, age, veteran status, disability, or any other status protected by applicable federal or state law. Sexual violence is also prohibited, including but not limited to sexual misconduct, sexual exploitation, sex-based stalking, and dating/intimate partner violence. MU Collected Rules & Regulations: <http://bit.ly/2r9IsqP>

For more nondiscrimination information, please visit the Title IX website at <http://civilrights.missouri.edu> or contact Callie Glascock, Extension Budget Director and Interim HR Administrator, at glascockck@umsystem.edu or call 573-882-9016.

Faculty and staff must use one of the following nondiscrimination statements with programming and materials. [See the full University of Missouri System policy.](#)

Use the full EEO statement whenever possible:

University of Missouri Extension provides equal opportunity to all participants in extension programs and activities, and for all employees and applicants for employment since their demonstrated ability and competence without discrimination on the basis of race, color, national origin, ancestry, religion, sex, sexual orientation, gender identity, gender expression, age, genetic information, disability, or protected veteran status.

Use the short EEO statement for instances of limited space:

An equal opportunity/access/affirmative action/pro-disabled and veteran employer

c. Americans with Disabilities Act (ADA)

Include the following ADA statement, complete with your contact information, for all program and course handouts:

Contact us immediately if you need accommodations because of a disability, need to relay emergency medical information or need special arrangements if the building is evacuated. Contact:<insert program staff name, email and phone number here>.

Nondiscriminatory behaviors are included in the **Volunteer Code of Conduct** that must be signed by volunteers on an annual basis. This is especially important if, as part of their role, they may be able to accept, reject, accommodate or not accommodate a client as part of their work. Examples of a volunteer in this type of role include:

- 4-H club leaders
- Master Gardeners
- Master Naturalists
- Regional and state extension council members

d. Accommodations

A learner's need for accommodations may be minimized through the use of universal design for learning (UDL) — using materials and practices that are equitable, flexible, fully accessible learning environment, designed to meet the needs of diverse learners, and use multiple means of engagement, expression and representation. Implementation of UDL includes the following examples:

- Using captioned videos, films and other audio presentations (beneficial for not only those with sensory disabilities but also those with specific learning disabilities, students whose first language is not English, and others)
- Flexibility regarding attendance
- Providing texts in alternate formats
- Using guided notes
- Giving verbal descriptions of visual aids and graphics
- Paraphrasing questions and answers
- Highlighting key points throughout discussions

Should you have questions regarding how best to accommodate an extension learner with a disability or about implementing some of the suggestions listed above, please contact Callie Glascock, Extension Budget Director and Interim HR Administrator, at glascockck@umsystem.edu or call 573-882-9016.

e. Equity

All University of Missouri Extension administrators, faculty and staff are responsible for ensuring that they follow university and federal laws, regulations and policies relative to civil rights, Affirmative Action and Equal Employment Opportunity. MU Extension follows USDA's standards of compliance for extension programs and requirements for land-grant institutions with the following actions:

- Maintaining civil rights files
- Creating annual Affirmative Action plans
- Conducting internal compliance reviews
- Providing training
- Collecting demographic data about program participants

f. Sexual harassment

Volunteers with University of Missouri Extension and university staff are expected to follow the University of Missouri policies on sexual harassment. Specifically, avoid harming youth or adults, whether through sexual harassment, physical force, verbal or mental abuse or neglect. Retaliation for making or supporting a report of discrimination or harassment is also prohibited. Volunteers must report any sexual harassment incidents to the MU Office for Civil Rights & Title IX at 573-882-3880 or at civilrights.missouri.edu (MU Collected Rules & Regulations).

g. Annual Volunteer Code of Conduct

Who needs to sign this agreement, and who does not?

This policy applies to any volunteer who accepts the following responsibilities:

- Teaching extension-related content
- Serving individually or as a member of a standing advisory group for program policy
- Serving as a member of a committee or advisory group that participates in allocation or management of resources related to program conduct or delivery
- Soliciting or managing donations of goods or funds in support of specific or general extension program efforts

Elected or appointed members of Missouri county extension councils are not covered by this policy within the bounds of their role on the county extension council. As members of an official Missouri governmental body, other rules and policies apply.

County extension council members serving in a volunteer outside of their elected extension council role should read and sign the agreement. Staff serving as extension volunteers (performing duties different than their paid work) should read and sign it as well.

Volunteers serving short-duration or in a brief ad hoc advisory role may not need to sign the agreement. Consult your county's Community Engagement Specialist (CES) for guidance. Individuals delivering information or coordination as part of their professional responsibilities that flow from other businesses or agencies are not expected to sign the MU Extension Volunteer Conduct policy in most cases.

What are faculty or staff responsibilities regarding this policy?

Under the direction of your respective CES, volunteers covered by the policy must sign, date and return the volunteer conduct agreement before engaging in the volunteer activities for which they have volunteered. In cases where volunteers will be working with youth program participants, Child Abuse and Neglect (CA/N) screening is necessary. This will require additional lead time for the screening to be successfully accomplished before the volunteer will be able to begin in their volunteer role. Steps toward volunteer screening will be provided by your CES.

When did this policy go into effect?

Implementation began Jan. 1, 2016. The Code of Conduct was streamlined to a one-page document in 2017. All program volunteers should physically or digitally sign the agreement **beginning Dec. 1, 2017.**

Where do the signed agreements need to be kept on file?

Staff should maintain completed forms in digital or paper form at the county office where the program takes place.

Do staff need to keep a paper copy of each signed code of conduct or can staff accept electronic versions?

An online version is available at https://missouri.qualtrics.com/jfe/form/SV_3XcCMH9n9Og9M6F

If this online code of conduct is submitted, it is retained in a database. Staff will have access to this database and should monitor compliance.

Do volunteers need to sign a copy of the policy more than once?

Some volunteers are active with extension on a county level in multiple programs. Others are active both locally and regionally. How this gets handled is a judgment and management decision by the extension staff involved. In the real world, it probably would be easiest if a volunteer simply signs an agreement for each volunteer role in which they serve at each level. For example, if one person serves as a local Master Gardener volunteer in one county and also works with the Community Arts program on a regional level, it may make practical sense to ask the volunteer to sign an agreement form that can be filed and kept with the records of each respective program.

Furthermore, asking the volunteer to sign for each program helps confirm in the mind of the volunteer, the fact that they are working with MU Extension across multiple programs.

How often does a volunteer need to sign the form?

Annually. If a person began a volunteer role July and continues as a volunteer with the same program the next year, the volunteer would be asked to renew the following July by resubmitting the signed agreement. Some programs have a recognized program year and it would make sense to follow that cycle. Other volunteers may begin partway during a program cycle. In this case, have them sign at the beginning of their volunteer role, and then sign again when the full program cycle begins again.

What happens if a volunteer seems to be in violation of any of the items in the conduct policy?

Staff should consult the coaching section of this handbook and also contact their immediate supervisor for consultation.

Which MU Extension staff member signs as "supervisor" for each volunteer form after the volunteer signs it?

In many cases, that would be the MU Extension staff directly responsible for the program in which the volunteer is active. For other cases, supervisor sign-off will be at the CES level.

What should happen if a volunteer refuses to sign, or will only sign with qualifications?

Signing with "exceptions" or "qualifications" on the part of the volunteer is unacceptable. If they are unwilling to sign or simply "don't get around to it," they may not serve as an MU Extension volunteer. It is that simple.

Experience has taught that often resistance is a result of insufficient orientation as to why the policy is in effect in the first place. A positive attitude from staff regarding the importance of this policy is fundamental as well. Be sure to include open discussion and orientation for volunteer applicants that include an over-arching perspective of how the program for which they volunteer is a part of a broader extension program, and part of the educational mission of the University of Missouri.

University of Missouri (MU) Extension Volunteer Code of Conduct

Volunteers are key MU Extension partners, helping guide and deliver programs that matter to Missouri citizens. Extension depends on and expects all volunteers to understand and uphold the following Volunteer Code of Conduct at all times.

BE ACCOUNTABLE TO AND WORK WITHIN THE MU EXTENSION SYSTEM

1. Work within the scope of assigned volunteer role and follow all related program policies and procedures.
2. Conduct behavior in strict accordance with applicable laws and MU confidential information policies, using confidential information only as needed to perform volunteer duties. The following rules apply:
 - a. access confidential information only with proper approval and refrain from misusing or treating it carelessly;
 - b. do not divulge, copy, release, sell, loan, review, alter or destroy any confidential information except as properly authorized;
 - c. understand and agree that any violation of the responsibilities explained in this section subjects a volunteer to discipline, possible removal from the volunteer role or legal liability. (Collected Rules & Regulations, §110.005, Business Policy Manual, §108).
3. Treat all youth and adults equally, without discrimination. This includes providing equal access to participation for all youth and adults, regardless of race, color, sex, pregnancy, national origin, ancestry, sexual orientation, gender identity, gender expression, religion, age, veteran status, disability, or any other status protected by applicable federal or state law. Sexual violence is also prohibited, including but not limited to sexual misconduct, sexual exploitation, sex-based stalking, and dating/intimate partner violence. MU Collected Rules & Regulations: <http://bit.ly/2r9IsqP>
4. Avoid harming youth or adults, whether through sexual harassment, physical force, verbal or mental abuse or neglect. Retaliation for making or supporting a report of discrimination or harassment is also prohibited. Volunteers must report the incident to the MU Office for Civil Rights & Title IX at 573-882-3880 or at civilrights.missouri.edu (MU Collected Rules & Regulations).
5. Assume the role of a mandated reporter and, if concerned a child has been/or will be abused and/or neglected, contact the Missouri Child Abuse and Neglect Hotline 1-800-392-3738 (TDD 1-800-669-8689). If the situation is not an emergency, an online report (<http://dss.mo.gov/cd/can.htm>) can be made. In addition, mandated reporters (anyone with care, custody or control of a child) should contact the MU Extension employee serving as the supervisor of assigned volunteer role. If it appears the child is in imminent danger, contact law enforcement as well. (5/11/17, Pursuant to § 210.115 RSMo).
6. Avoid conflict of interest between assigned MU Extension volunteer role(s) and personal business interests.

BE A POSITIVE ROLE MODEL AT ALL TIMES

1. Obey laws of the locality, state and nation, including forgery, theft, destruction or defacement of property.
2. Display mutual respect to others, practicing patience, cooperation and teamwork.
3. Practice personal and intellectual integrity.
4. Under no circumstances engage in unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance at any extension-sponsored or extension-supervised event. Avoid unlawful possession, use and/or distribution of alcohol at any extension-sponsored or extension-supervised event. Avoid misuse or abuse of prescribed or over-the-counter drugs.
5. Be respectful of diverse opinions and perspectives.
6. Actively promote a safe environment for participants, volunteers, visitors, staff and others involved in the program.

Volunteering is a privilege, not a right; and failure to uphold any of the code of conduct standards above may result in coaching by assigned MU Extension supervisor. This may include reassignment, role restriction and, if appropriate, removal from all MU Extension volunteer roles.

Volunteer Signature	Date	Phone number	Program
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Supervisor Signature	Date	Phone number	Program	<i>Revised 6/23/17</i>
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3. RISK MANAGEMENT

a. What Is risk?

A risk is any uncertainty about a future event that threatens your organization’s ability to accomplish its mission. (Risk Facts — Nonprofit Risk Management Center). There many unexpected things that can happen to participants, spectators, properties, and even the reputation of MU Extension programs — these are all considered risk.

Risk management

Risk management is the process used to protect assets by minimizing the potential for negative outcomes. It means anticipating what the risks could be and planning ways to manage these risks. It means continually considering the following questions:

- What can go wrong?
- How bad could the damage be?
- What will we do?
- How will we do it?

MU Extension expectation for risk management

Plan for the unexpected as much as possible. While planning an event or activity, take time to consider the risks and develop a risk management plan. Be sure to follow established guidelines. This document describes specific guidelines. Never hesitate to ask. Do what a reasonable and prudent person would do.

General risk management strategies

Once you have identified the risks, develop a risk management strategy to address each risk. Alternatives to managing risks include:

- Retain the risk — Accept the risk and prepare for the possibility of loss to occur.
- Reduce the risk — Change the activity or conditions to decrease the likelihood that a loss will occur.
- Share the risk — Find someone to share some of the risk. Ways to share risk include carrying accident/medical insurance, using informed consent forms, or paying vendors for services.
- Avoid the risk — Do not conduct the activity. If the risks are too severe and the possibility of harm is too great, do not hold the event. This should happen rarely.

Risk management planning checklist

Date Completed	Person in Charge	Description
General Operations		
		Age-appropriate activities and assignments have been identified.
		Risks analyzed strategies identified to address these risks and a risk management plan written and shared with staff, volunteers, and youth.
		Accident/medical Insurance taken out on all participants
		Certificate of self-insurance secured from the university’s Office of Risk Management. (if needed)
		Cooperating organizations have liability insurance. (if needed)
		Emergency action plan is written.
		Other:
Risk to Personnel		
		Role descriptions written and shared with adults and youth in leadership roles.
		Guidelines for event are written and shared with staff, volunteers and youth.

		Volunteer applications, screening and approval completed on all volunteers who have direct contact with children.
		Orientation provided for staff, volunteers and youth.
		Adequate number of volunteers secured to chaperon this event. 1:10 (or lower) adult to youth ratio.
		Other:
Risks to Participants		
		Role descriptions written and shared with participants.
		Code of Conduct shared. Parental Permission/Informed Consent forms are completed for each participant.
		Training provided on the use of equipment and tools.
		Proficiency of skills by youth has been considered. If individual youth will be featured in publicity, photo release forms are completed by all youth and signed by parents for those under the age of 18.
		Medical release or health forms completed by youth participants.
		Transportation provided only by parents or by screened volunteers who have insurance and a valid license. Insurance and license should be verified. Youth under the age of 18 will not provide transportation.
		Other:
Risks to Public		
		Publicity sent to local media to alert public that this event will be occurring.
		Other:
Risks to Property/Buildings/Equipment		
		Site review has been completed prior to the activity. Concerns have been addressed and information shared with volunteers.
		Equipment and tools for the event have been secured, checked for safety measures and instructions provided. Adequate insurance to cover damage to major equipment is provided.
		Other:
Risks to Perpetuation		
		A risk management plan is in place to help protect the image and perpetuation of the MU Extension program.
		Extension staff is informed of event or activity.
		Other:

Role of the MU Risk and Insurance Management office and legal counsel

Extension staff may contact the MU Risk and Insurance Management office anytime an event or program is planned and there are concerns about the safety of the participants or the risks that might arise.

MU Risk and Insurance Management
1105 Carrie Francke Drive
Columbia, Mo 65211
573-882-8100

Report any incident of damage to person or property to MU Risk and Insurance Management using [Form UM200](#) Incident Report. For major incidents or things that might happen on a weekend, staff may also want to send an immediate e-mail to the MU Risk and Insurance Management office with a report to be followed on UM200. It is helpful if you also have names and addresses of witnesses when appropriate. Staff should copy their supervisor on all correspondence.

The following communication plan should be followed when reporting any non-emergency person or property damage.



b. Liability

Liability insurance provides protection for the organization and for the individuals working on behalf of the organization for claims of bodily injury and/or property damage that may arise from negligent acts.

Recognized volunteers working on behalf of MU Extension programs are protected by the University of Missouri’s liability insurance. Recognized volunteers are those that have been notified of their approval as a recognized volunteer. In the case of “episodic” or limited-activity volunteers, some other documentation should verify the expectations of the volunteer by the staff serving as the program’s volunteer manager and the acceptance of the role by the volunteer, (i.e., a letter, name printed on an event flier, agenda, etc.) When recognized volunteers are working on behalf of MU Extension, the University of Missouri provides liability insurance coverage. MU Extension staff can request more coverage and requirement details from the office of Risk and Insurance Management.

The purchase of liability insurance is recommended when another organization or entity is providing a program or service. Examples are a botanical garden, a local fair board, agricultural association or other community group. Since these groups are organized as legal bodies separate from MU Extension, the persons directly employed or volunteering with those organizations are not considered university staff or recognized volunteers. Thus, liability coverage is **not** provided.

Certificates of insurance

What is proof of insurance and why would I request it? A self-insurance letter or certificate of insurance demonstrates evidence of insurance. The university is regularly required to show proof of coverage to satisfy contracts and agreements for using other facilities and a host of other obligations. For example, when a county 4-H or Master Gardener group is going to use someone else’s facility, the university may be required to show proof of insurance to offer the event.

In order to obtain proof of University of Missouri insurance or self-insurance coverage, staff will submit an [online request form](#). The form allows you to log in using your university ID and password to pre-fill the requestor information. Next, you will complete the form following the required fields, review it for accuracy and select the submit button. Risk and Insurance Management receives the request and will provide the information.

For more information visit the MU [Risk and Insurance Management website](#) or read information on the MU [Certificates of Insurance](#) web page.

For more information about University of Missouri policy regarding volunteer liability visit http://www.umsystem.edu/ums/rules/bpm/bpm800/manual_801

c. Vehicles

Accidents in loaned vehicles

The owner is technically responsible for an accident. The owner’s insurance follows the car, no matter who is driving.

Charter buses

When planning a trip that requires the use of a charter bus company, ask the charter company for a “certificate of additional insured” or some verification that the company does have coverage. Otherwise it is considered “business as usual” for these companies. If a company refuses to provide this information, another charter company should be used that will provide this information.

The university’s policy on any agreement is to request evidence of coverage.

Overnight activity

Staff, volunteers and program participants staying awake all night should not be allowed to drive themselves or others home.

Traveling with youth

Adults should avoid being alone with a youth program participant. See additional chaperoning policies at <http://uoeshare.ext.missouri.edu/share/MUCampus/4-H/>

Passenger van guidelines

In April 2001, the National Highway Traffic Safety Administration issued a cautionary warning for 15-passenger vans and their propensity to rollover. According to the NHTSA study, “vans with ten or more occupants have three times the rollover ratio than those with fewer than ten occupants” The report goes on to state “the decrease in stability under fully loaded conditions correlates to an increase in the rollover risk of approximately 40 percent.” NHTSA said in its notice of caution that it is important that 15-passenger vans be operated by experienced drivers and that institutions using the vans require seat belt use at all times.

MU Extension recommends:

1. All 15-passenger vans are limited to a capacity of 10 people. The NHSTA report noted that vans with more than 10 people had a higher rollover rate.
2. Vehicle operators should ensure that all passengers are wearing their seat belts. (The NHTSA indicates that you can reduce your chance of being killed in a rollover by about 75 percent just by wearing a seat belt.)
3. Limit speed to 65 MPH on all 15-passenger vans. In most of the van accidents reported, speed was a contributing factor.
4. No driver younger than 21 should be allowed to drive a 15-passenger van. Any driver should be a University of Missouri employee or recognized volunteer.
5. There should be no roof racks or trailer hitches on the vehicles. Luggage and gear should be stored in the vehicle (with a limit of 10 passengers, there will be more storage area, but the rear window should not be blocked by luggage).
6. For long-distance trips, drivers should rotate every two hours. We recommend a maximum driving shift of two hours, with no driver taking more than three shifts. The maximum driving day with three drivers should be 18 hours.
7. Driving through the night is not permitted. Do not drive past midnight. Front passenger should remain awake to help keep the driver alert during all shifts.

Volunteers (including teenage drivers) in private vehicles

As long as the volunteer (including teenage youth) is a recognized volunteer and volunteering on behalf of MU Extension, they are covered by the university’s auto liability program. Remember that the auto liability program is in excess above the individual’s own personal insurance that they are required to have on the vehicle. Any medical costs or lost time incurred while volunteering would be subject to recovery provided through the State of Missouri’s workers’ compensation program.

Additional insurance for rental cars

Purchasing insurance coverage for rental vans with seating capacity over eight is recommended. The university card provides some protection as does the university’s self-insurance program. See the following link. <http://www.umsystem.edu/ums/fa/management/risk/insurancecoverages-automobile>.

Vehicle and trailer ownership

Vehicles and/or trailers donated to or purchased by extension councils are considered extension council property and not owned by the university.

d. MU Extension emergency procedures

Make sure to follow these steps in accidents resulting in serious injury and/or fatality and incidents that involve law enforcement and/or may result in litigation.

1. Priority attention: care for injured; stabilize the situation.
2. Call 911 or police, ambulance and clergy, as appropriate.
3. A responsible MU representative stays at the scene.
4. Make NO statements. Exceptions: the police, county engagement specialist, regional director, MU legal counsel, MU risk management or university relations staff.
5. Refer all media to University Relations. DO NOT MAKE ANY COMMENTS!
6. The designated person must immediately contact the injured person's next of kin (e.g. parent) to inform them of the situation.
7. If emergency contacts cannot be reached, call the police for assistance.
8. Contact supervisor, state program office and MU Risk and Insurance Management immediately.
9. Contact University of Missouri legal counsel.
10. Immediately complete the following [*UM200 Incident Report*](#), writing objective, factual notes. Within one week, submit the Events/Accident Incident Report to your supervisor, regional director and state program director.

e. Information management and records retention

A key component of risk management is the maintenance of records. Their absence or existence (and their quality and consistency) can make all the difference in a legal dispute. All volunteer records relating to all steps of volunteer management should be kept for a minimum of five years after the volunteer is no longer active. All files related to volunteers should be kept in a secure location such as a locked room or file cabinet. Staff is responsible for keeping the following information on file for enrolled volunteers: application, reference checks, background check result (if applicable), record of orientation and or training, documentation of any complaints by or against the volunteer, record of achievement and/or recognition and copy of driver's license and insurance (for Senior Companion Program).

**University of Missouri Extension
Event/Activity Incident Report**

This report is to be used by MU Extension staff to document facts and actions regarding participants or staff who may become ill, are injured, who may break the rules, who have lost valuables or who might have an additional issue of concern.

Participant's Name

Time and Date of Incident

Person reporting

Nature of incident:

Witnessed by:

Identify the nature of the incident or problem:

Observations by others regarding the incident:

Action(s) taken (in order, detailed description):

If parents/authorities were contacted, describe conversation, noting names, date and time.

Disposition of problem:

Medical treatment that may have been necessary:

Signature of person filing report _____ Date _____

Signature of witness/reviewer _____ Date _____

Signature of participant _____

Date _____

Staff: File this incident report, fully completed and signed to your supervisor, regional director and state program director.

Suicide attempt protocol:

1. Stay with the person or designate one or more individuals to stay with the person. Never leave the person alone.
2. Call **9-1-1** or your local emergency service provider.
3. Contact additional staff members as necessary.
4. If the person is a youth, contact the parents to tell them what has occurred. Make arrangements to meet at the appropriate location, for example, the event site or the emergency room of the local hospital.
5. If the person is a youth, make a plan to follow up with the parents and student regarding medical and/or mental health services.

f. Program-specific risk management policies can be found online :

- Animals and Liability — <http://extension.missouri.edu/p/G453>
- Chaperoning Youth — <http://4h.missouri.edu/doc/chaperoning.pdf>
- Food Stands — <http://4h.missouri.edu/doc/Guidelines-for-Temporary-Food-Stands-MO.pdf>
- Plant Sales and other Master Gardener Fundraisers — http://mg.missouri.edu/pdf/Statewide_guidelines_II.pdf
- Home Garden Tours — http://mg.missouri.edu/pdf/Statewide_guidelines_II.pdf

g. Financial management

Volunteers should work with local staff for contracts and purchasing to determine the appropriate process. Staff should work with their respective volunteers in understanding and adhering to program specific policies found in the following manuals:

- 4-H Risk Management Manual, August 2017, pages 16-18
- Master Naturalist State Program Manual, January 2017, pages 13 and 32
- Master Gardener Program State Operational Guidelines, pages 5, 7-8
- Expanded Food & Nutrition Education Program Volunteer Policy, June 2017, pages 1-2

Campus expenditures should follow procedures in the MU Business Policy. See: <http://bppm.missouri.edu/> and <http://extension.missouri.edu/staff/fiscal/university-fiscal.aspx#gsc.tab=0>

County expenditures should be done per the MU Extension Fiscal Policy and Procedures. See: http://extension.missouri.edu/staff/fiscal/documents/policy/Fiscal_Policies_and_Procedures.pdf

See the [letter](#) for federal tax information summary and a copy of the federal tax-exempt statement.

MU Extension volunteers are not authorized to sign any contracts or agreements on behalf of the university. Any contracts or agreements need to be initiated through the University of Missouri's authorized process.

Staff members should not put volunteers in a position where they need to be reimbursed. Volunteers should never make a purchase without prior approval. If an emergency occurs in which a volunteer is required to make a purchase, any purchases made must be in accordance with university purchasing policies with the understanding and advice of a staff member. In such a case, a volunteer would be expected to provide the original, itemized receipt as well as a W-9: <http://www.irs.gov/pub/irs-pdf/fw9.pdf>.

No MU Extension staff should have their name on, or have signature authority for, any financial accounts of organizations they work with in their role as an employee of the University of Missouri without prior permission from their program director. MU Extension employees found to be in violation of this policy will face disciplinary action.

4. VOLUNTEER PROGRAM EFFECTIVENESS

Identified volunteer roles

Prior to any volunteer recruitment or selection effort, staff should develop a volunteer role description for each volunteer program or project. Staff should review and update volunteer role descriptions every three years. Program changes may warrant more frequent review and updates. Staff are encouraged to review role descriptions with volunteer input when considering updates. Staff may use the [Volunteer Role Description Template \(PDF\)](#) to develop role descriptions that include:

- Role title

- Overall goal of the program or project
- Specific objectives of the position
- Responsibilities associated with the position
- Qualifications
- Time commitment (e.g., time of year, number of approximate hours/month)
- Supervisor's name and contact information
- Resources available (e.g., training, mentoring, publications)
- Program benefits

Recruitment

Extension volunteers will be recruited to reach beyond traditional demographics to demonstrate organizational readiness to welcome and engage a diverse cadre of volunteers. MU Extension shall not discriminate on the grounds of race, color, religion, sex, sexual orientation, including transgender status or gender expression, national origin, citizenship status, age, disability, or veteran's status in employment, education, and all other areas of the University of Missouri System. Qualifications for volunteer roles will be based on ability and suitability to perform a task on behalf of the organization and in compliance with program guidelines.

Screening and selection practices

If a volunteer applicant is going to be working with minors in an ongoing manner outside the classroom setting, a Missouri Child Abuse and Neglect screening is required as well as a national criminal background check. The background check procedure is available to all Extension staff on the password protected staff share drive.

Not every applicant will be able to meet the expectations of a specific MU Extension volunteer role. The application and screening process can help you determine this. Under no circumstance can staff ever reject a volunteer application for reasons that would fall under our nondiscrimination policy. However, if the person does not have the necessary skills or qualities that will enable the volunteer to carry out the volunteer role and/or uphold the behavioral expectations, then staff can deny a person's application.

Reasons to reject an application might include:

- negative background check reports
- an unwillingness to sign the MU Extension Code of Conduct, which includes the university's nondiscrimination policy
- a history of negative volunteer behavior, etc.

If staff feel the need to reject a volunteer applicant, staff should consult with their respective program director or regional director to discuss the reasons for making this decision.

One of the most important aspects of volunteer selection is staff making the best match between volunteer roles and volunteer applicants. The MU Extension Human Resources office approved the following volunteer interview questions in August 2017. Staff should use a consistent subset of these questions with all volunteer applicants applying for the same volunteer role. Staff should contact the MU Extension Human Resources office with any questions about interviewing practices.

Volunteer interview questions

General questions

- Why do you want to be a volunteer in our organization?
- Tell me about your current and past volunteer experiences.
- What have you enjoyed most about previous volunteer positions?
- How much time would you like to volunteer?

Leadership skills

- What skills and qualifications do you have that will help you in this position?
- Describe a leadership role you have held.
- What made that role challenging?
- What did you like about serving in a leadership role?
- What did you dislike?
- Describe how children/other adults would view you as a role model.

- What kind of rewards do you need to stay motivated?
- How do you like to be recognized?

Human relations skills

- What kind of people do you most enjoy working with?
- Describe a time when you've been involved in a conflict with another individual or group.
- How did you handle the situation?
- How do you feel about working with people different from yourself? What did you learn? (i.e., different racial/ethnic backgrounds, developmentally disabled, different socio-economic, backgrounds, different sexual orientation, etc.)

Organizational skills

- Describe a typical day for yourself.
- Describe a particularly busy day.
- What record keeping experience have you had?
- Are you willing to attend orientation/training sessions to assist in your volunteer role?

Adaptability

- Describe a situation in which you did not get your way or when you did not agree with a decision made. How did you handle it?
- What was your reaction?
- Describe a particularly stressful situation in which you have been involved.
- How did you handle this?
- What made it stressful?

Dependability

- Describe one project or activity for which you had total responsibility from the beginning to the end.
- How do you handle a situation when you know that you are unable to complete an assignment or commitment?
- Do you have available transportation if needed?

Communication

- How comfortable do you feel speaking in front of a group?
- In your opinion, what makes a good listener?

Orientation

All Extension volunteers will receive a program-specific orientation through their volunteer supervisor. All extension volunteers should participate in some form of the one-time *Welcome to MU Extension Volunteer Orientation*. Volunteers should talk to their supervisor to find out if program-specific orientation is required.

MU Extension is committed to best practice, ensuring that volunteers are properly trained to carry out their work. Individual training requirements, based on program area, will be identified in role descriptions and through initial contact and communication with staff.

Training

There are certain trainings that are appropriate for all MU Extension volunteers, located on the [MU Inclusion, Equity and Diversity Education and Professional Development](#) web page. If a volunteer works with youth, the [Mandated Child Abuse and Neglect Reporting training](#). Volunteers should talk to their supervisor to find out if program-specific training is required.

Utilization (supervision and communication)

Utilization of volunteers is a fancy way of saying this is where the real work takes place — for the volunteer and the volunteer manager. This is a critical point in the ISOTURE framework, as the volunteer is actively involved in carrying out the duties outlined in the current volunteer role description.

Build your own communication and supervisory skills

Volunteer management can be rewarding and also challenge. Therefore, it is wise to build your communication, listening and supervisory skills. Where can you do this?

- The MU Extension Human Resources' training staff regularly offer trainings on these topics and may be able to do regional in-person or online trainings.
- Practice a variety of communication styles. Not everyone texts and not every volunteer is able to visit the county extension center during office hours. Ask volunteers their preferred communication style. Your goal is to continually guide and support a volunteer's work.
- Enroll in [Achieving the Extension Mission through Volunteers](#), the North Central Region's extension online volunteer management course.
- Read a book or listen to a podcast (e.g., [University of Minnesota Youth Development series](#))
- Talk with more seasoned extension staff who manage volunteers, including those from other program areas (e.g., Master Gardeners, Master Naturalists, extension councils).
- Learn all you can about communicating and working with different generations. The volunteers you work with may be part of several different generations and therefore, have different motivations, communication styles and recognition preferences.

Communicating with volunteers at a distance

Volunteers deserve a clear understanding of what they should be doing and how they are doing. This requires ongoing communication and support in order to effectively carry out extension programs. This can be a challenge, given the fact that staff can't be everywhere at once!

1. Plan your distance communication and supervision. Don't let it just happen.
2. Get current experienced volunteers trained to assist in the communication process.
3. Trained volunteers can call or email and ask "How's it going?" Help these volunteer mentors develop specific questions to find out how the new volunteer is doing.
4. Newsletters, blogs or podcasts can be effective communication tools, but only if they speak directly to the volunteers who are supervised at a distance.
5. Volunteers at a distance can be put off by formal communications. Find a way to let your humor and sense of fun show in your communication.
6. Show interest by meeting volunteers in their communities where they are most comfortable.
7. Send personalized notes of thanks. Ask volunteers for short notes outlining success and needs.
8. Find out if volunteers in the county can help plan recruitment, orientation and/or training for others like them. They are the best source of information to prepare the future volunteers.
9. Organize volunteers into self-supporting teams. Train them to function as a group. Make sure there is a team leader who has trained to be cheerleader not a dictator.

Concerns about active volunteers

As a county or multi-county volunteer manager, you are probably not going to be the firsthand witness to a volunteer's performance. More than likely, you will begin to hear from other volunteers and program participants. This is not the time to ignore or dismiss others' concerns.

See the *Extension Decision Tree* handout in the Appendix to guide you through a series of questions to help you handle dilemmas. In many cases, the root of the issues do not have to do with the extension program, but are brought into the volunteer program you manage.

Dismissing an active volunteer typically should be a **last resort**. In most cases, dismissing an active volunteer is an admission that volunteer management has failed. Reaching a point where one feels the need to dismiss a previously approved volunteer may mean:

- the volunteer selection system did not work
- the volunteer role description was missing or faulty
- training, supervision and coaching did not operate the way it should

Dismissing a volunteer can be as much a reflection of our organization as it is of the volunteer. Therefore, every effort should be made to inform the volunteer of their performance/behavior problems before making plans to dismiss the volunteer. The person should be given an opportunity to correct the problem and should be provided with support to make desired changes.

Here are some alternatives to keep in mind if the active volunteer is not performing up to expectations:

Reassign

Place the volunteer in a new role. Perhaps their skills or motivations were misread at the time of initial assignment. Place and support the person in a new volunteer setting and see what happens.

Retrain

Perhaps the volunteer needs some additional training or may require a different training approach such as one-on-one or mentoring. If the problem is lack of knowledge, work to provide the knowledge they need.

Revitalize

Sometimes long-time volunteers just need a rest. Perhaps assigning a co-volunteer or someone with whom they can share their responsibility would be helpful. Sometimes transferring for a while to a different responsibility will afford someone the opportunity to recharge.

Refer

Perhaps the volunteer just needs to gain a different perspective by volunteering in another organization. You may have noted skills that this individual could bring to another organization.

If problems continue, continually document observable behaviors as well as your response as the person's volunteer supervisor. Then review the steps in the next section. The key during this process is to obtain the facts of the situation, to be as objective and unemotional as possible, and not to make hasty decisions.

Coaching volunteers

Preparing for coaching

1. Contact your supervisor to discuss the situation.
2. Contact the volunteer systems or risk management coordinator for current policies.
3. Review the Volunteer Code of Conduct that volunteer applicants digitally agree to on an annual basis in their *4HOnline* volunteer member profile. This document outlines the behavior expectations that all volunteers will observe. If a volunteer's personal conduct violates the Volunteer Code of Conduct, **the individual should be coached during an in-person session.** Phone or email communication is not appropriate at this time, other than to set up the time to meet face to face.
4. Keep a detailed communication log (e.g., phone call attempts, emails, meeting dates), copies of any written complaints about the volunteer and any coaching meeting minutes.
5. Review the following coaching script based on McCurley and Lynch's *Positive Correction Action* process.

Coaching Script

Adapted by T. Gillespie from McCurley and Lynch, *Positive Correction Action* (2011)

Purpose:

- Develop the volunteer's positive growth.
- Relate what was seen and heard and what effects that behavior has had on others.
- Support the person in reaching desired performance results for everyone's benefit (yours, the volunteer and the organization as a whole).

Preparation:

1. Pick an appropriate amount of time; don't rush.
2. Pick a private setting.
3. Provide good eye contact.
4. Stay calm.
5. Acknowledge the volunteer's feedback; thank the volunteer for sharing his/her perspective.
6. Consider all the information from many perspectives.
7. Consider if the volunteer is having difficulties outside of their volunteer role.
8. Seek to understand; ask for clarity or more detail on any issue.
9. Be specific, using observed behavior as the talking point; rely on facts.
10. Asks lots of questions.
11. Keep good notes.
12. Determine if volunteers need additional support from you in the form of mediation, access to resources, more training, redefinition of role.

	Action Steps	Volunteer Manager (In a helper role)	Volunteer	Notes
1	Volunteer describes behavior	<i>"How would you describe your performance in this situation?"</i>	Person describes own behavior.	If the volunteer is not able or willing to describe the problem, the vol. mgr. will have to do this for the person, only stating what the person did or did not do – without judgment. <i>"You interrupted both the club president and the reporter before they finished speaking."</i>
2	Separate the behavior from the volunteer's self-worth. Talk about the unacceptable behavior (what they did, not who they are). On the other hand, if the behavior IS typical of what they do...	<i>"That's not like you." Or "That's not up to your usual standards" or "I'm surprised" or even "I think you can do better than that."</i> <i>"I'm confused by all this" or "I'm puzzled"</i>		If the person attempts to divert you into talking about someone else's performance, you would say, <i>"XXX's performance is a matter for me to discuss with him/her. What we are talking about here is your performance. I believe you have the capacity to do a great job for us here. Please tell me what you'll do..."</i>
3	Say something positive Diffuse defensiveness (Praise person for positive trait they possess (PPPTP). Validate who they are. If you can't think of anything to say, fall back on...	<i>"I feel you care about our program participants."</i> <i>"You are a smart person."</i> <i>"You are a consistent helper."</i> <i>"I believe you are capable of succeeding in this volunteer role"</i>		
4	Ask for a clear, detailed and observable improvement plan Listen to excuses but insist on performance expectations.	<i>"What should you be doing?" or "What will you do next time?" or "What can you do to fix it?"</i> <i>"How will you be sure you meet that expectation in the future?"</i>		If the person cannot clearly picture themselves doing something different, they likely won't be able to improve.
The four steps above generally improve the performance. The next two steps are supportive of the first four and include repeating steps.				
5	Improvement — Give praise for any improvement in performance. No improvement — Return to step 4; ask for clear, specific and observable improvement plan)	<i>"That's more like it"</i> <i>or</i> <i>"You get better every meeting."</i> <i>"How will you do even better next time?"</i>		

	Action Steps	Volunteer Manager (In a helper role)	Volunteer	Notes
6	<p>Improvement continues — repeat step 3; praise traits starting to emerge</p> <p>No improvement — Return to steps 1-4 plus letting the volunteer know that she or he must have improved performance.</p>	<p><i>“I noticed that you allowed the club president and reporter to run the entire meeting by themselves, without any interruptions.”</i></p> <p><i>“This is a serious matter. How will you make sure that you meet the expectation in the future?”</i></p>		<p>If the person still performs at an unacceptable level, you should replace him/her with a volunteer who can do the job and meet code of conduct expectations.</p> <p>Alternatives to firing:</p> <p>Reassign to new position</p> <p>Retrain for a 2nd education</p> <p>Revitalize — let them re-charge</p> <p>Refer to another organization</p> <p>Retire them with honor/dignity</p>

Level 1 Coaching

1. Contact your supervisor to discuss initiation of a coaching process with a volunteer.
2. Send a written request to meet in-person with the active volunteer. If after three documented efforts the volunteer does not respond, then proceed directly to Coaching Level 3.
3. If contact is made, staff meets in person with the active volunteer to discuss expectations related to their volunteer role, performance concerns and/or violations of the Youth Protection Policy. The focus should be on the person’s observable behavior not them as a person.
4. Together, set and write specific improvement areas and desired supports from you or others. Set a follow-up meeting date and time to check in on progress toward agreed upon goals. Let the person know that you will follow-up with a letter and that the county engagement specialist, regional director and program director will also receive a copy.
5. Send the follow-up letter to the volunteer within a few days, summarizing the incident(s), meeting purpose, outcomes and follow-up meeting date/time. Immediately send a copy of the confidential letter to the county engagement specialist, regional director and program director.

Level 2 Coaching:

1. If problems persist, continue to document the volunteer’s behaviors, any reported or written concerns by others and his/her own (staff) response to the volunteer’s behavior.
2. Contact your supervisor regarding your initiation of moving forward with Level 2 coaching.
3. After consultation with the regional director, call or send a written request for a second, in-person meeting with the active volunteer. Again, communication of specific concerns should not be handled via phone or email messages.
4. If contact is made, the county volunteer supervisor meets in person with the active volunteer to discuss expectations related to the volunteer role, violations of the Youth Protection Policy/Volunteer Code of Conduct, the volunteer’s goal(s), your goal(s) and the agreed-upon training, mentoring, resources needed to improve the behavior within a 30- or 60-day probationary period. Use the Volunteer Performance Improvement Planning Guide (VPIP) in the Appendix during your in-person meeting.
5. Send a follow-up letter to the volunteer, summarizing the meeting, shared goal(s), offer to assist and details for the 30- to 60-day probation period. If you set a 60-day probation time frame you should mark your calendar to check in with the person at some point to make sure growth is occurring.
6. Immediately send a copy of the confidential letter to the county engagement specialist, regional director and program leader.

Level 3 Removal:

1. If problems continue, staff should continue to document the volunteer's behaviors, any reported or written concerns by others and his/her own (staff) response to the volunteer's behavior.
2. Contact your supervisor to discuss moving forward with Level 3 removal of a volunteer.
3. After consultation with the regional director, the staff should call or send a written request for a final, in-person meeting with the active volunteer. Again, communication of specific concerns should not be handled via phone or email messages. Use the letter template in the Appendix.
4. Set a meeting date and time in a private, public location (e.g., extension conference room) while others are in the building. Be professional, but direct, when communicating with the volunteer. Have a copy of the Code of Conduct that shows the date she or he digitally or physically signed and agreed to uphold the expectations.
5. Involve another third person of opposite gender of yourself during the meeting.
6. Review the *Managing Negative Responses to Feedback* guide in the following section.
7. Remain calm, thank the volunteer for his/her service to date and tell them that due to ongoing concerns, their volunteer role is being terminated for the remainder of the program year. Let the person know she or he has the right to request an appeal meeting and that request should be sent to you in writing. See Appeal Process Flow Chart on following page. Do not allow the meeting to become a shouting match or an apology for letting them go. Remain respectful, but firm and succinct. If you have gone through the previous steps of communicating, coaching and supporting the person as they worked towards improvement goals, then this meeting should be very straightforward and short.
8. Immediately after the meeting, document what took place during the meeting. Keep those records in a locked file cabinet.
9. Send a confidential, certified letter to the dismissed volunteer within a few days, summarizing the meeting date outcome and their right to send you a written request for a confidential appeal meeting within 15 days from the date of your meeting.
10. Immediately send a copy of the confidential letter to the county engagement specialist, regional director, and the program director.
11. As with other volunteer personnel decisions, staff must be consistent in maintaining a confidential atmosphere. Staff should be mentally prepared to experience negative response from the dismissed volunteer and/or her allies, including those that might be in positions of authority (e.g., representatives). Become vigilant with all who inquire or share concerns about the volunteer: "Volunteer selection is a confidential, personnel matter. Thanks for understanding."

APPEALS PROCESS

Volunteer receives written notice of dismissal and right to appeal decision.



Dismissed volunteer must send written appeal within 15 days of receipt of the notice. Send a copy of the confidential letter to the county engagement specialist, regional director and program director.



Dismissed volunteer and VPC meet in person so the person explains his/her perspective on why she or he should be reinstated. The VPC makes a decision and sends the person a written communication regarding decision within one week.



If the dismissed volunteer is not satisfied with the VPC's decision, she or he must send written appeal to the specialist within 15 days of meeting with Volunteer Personnel Committee (VPC). The specialist sends a copy of the confidential letter and any other documents to the county engagement specialist, regional director and program director.



The program director reviews all material and sends a final decision to the dismissed volunteer within 15 days of receipt of second appeal letter. Program director sends a copy of the final decision to specialist, county engagement specialist and regional director.

Managing negative responses to feedback

Each negative responses to feedback listed below has a built-in reward. By responding negatively, the individual's self-image is protected and the person avoids focusing on changing their behavior.

Volunteer response to feedback	Suggested volunteer supervisor response
<p>Stonewalling Volunteer blocks or refuses to listen to feedback. Disagrees.</p>	<p>Acknowledge that the volunteer disagrees. Restate your position.</p>
<p>Excuse making aka "yeah, but..." — the volunteer says "yes" to acknowledge the problem but then says, "but" to discount it. They are avoiding responsibility for the problem by conveying a contradictory message.</p>	<p>Acknowledge the "yes" portion. Repeat that portion of the response, then substitute your conclusion for the "but" statement. Describe the proper behavior.</p>
<p>The retaliatory exchange aka "The Topper" — The volunteer responds to feedback by criticizing the criticizer. Interaction becomes a mutual "put down" session.</p>	<p>Remember, it takes two to have a fight. Do not argue. If necessary, acknowledge the negative statement and move on.</p>
<p>Avoidance and withdrawal The volunteer isolates himself/herself from the criticizer. This behavior deprives the individual of any benefits of the feedback. Consists of a physical distancing from the criticizer.</p>	<p>Make a point to interact with the volunteer in a normal manner soon after discipline. Follow up with a short conversation in the near future.</p>
<p>Superficial acceptance Agrees with the criticizer, but no change in behavior or performance. Consists of emotional distancing from the criticizer.</p>	<p>If no change is forthcoming, clearly state the consequences of non-performance, and then take action.</p>
<p>Interfering emotions Reacts to criticism through displays of anger, crying and other forms of emotion as a way to stop the criticism.</p>	<p>Take a break, offer support, but <u>do not</u> stop the interaction.</p>

Additional dismissal situations

- **Immediate suspension or removal**

Volunteering for MU Extension is a privilege, not a right. Certain actions by volunteers may warrant immediate removal without benefit of preliminary coaching. This might include arrest or conviction for child abuse or neglect, violent crimes or other serious offenses. In some cases, a volunteer may be suspended from duty until an investigation is completed. Decisions on immediate removal or suspension should be made at the county level after discussion with the regional director and state volunteer systems or risk management coordinator. See letter template in Appendix.

- **Removing youth volunteers**

If a youth is in a volunteer role — similar to one that an adult might have, then follow the same coaching, and if warranted, removal steps as adult volunteers.

- **Removing state volunteers**

Some MU Extension programs engage state-level volunteers. The procedure for removing a state level volunteer is essentially the same as a county-level volunteer. The primary difference is that the volunteer manager (i.e., state specialist) convenes a Volunteer Personnel Committee consisting of another state specialist along with the volunteer systems or risk management coordinator. The VPC decision is final and a copy of the letter is sent to the program director.

Recognition

Staff and middle management volunteers should demonstrate appreciation and recognition to volunteers on a regular, ongoing basis. Any form of recognition should be appropriate and meaningful to the volunteer. Knowing what motivates a volunteer can help staff provide the most welcome form of recognition. A volunteer motivation assessment can be done as part of the application and selection process. Staff can access a volunteer motivation form at:

<http://extension.missouri.edu/hr/volunteers.aspx#gsc.tab=0>

Evaluation

At the current time, MU Extension does not use a system-wide volunteer evaluation process. Staff are encouraged to have their volunteers do an annual self-report. See an example at <http://extension.missouri.edu/hr/documents/vol-self-evaluation.pdf>

Reporting of volunteer time and impacts

Volunteers are essential in the delivery of educational programming and research-based information to carrying out the mission of MU Extension. They inform, complement and enhance the work of extension staff. Why is it important to track volunteer time?

- Tracking is recognition that volunteer time is important.
- Potential funders and donors want to know what resources your program already receives and from whom. Volunteer time can help meet requirements for matching funds in grant proposals.
- Documenting volunteer time can help protect volunteers and the university from allegations of misconduct or liability.
- Staff members are asked to report extension volunteer efforts and success stories in [myExtension](#).
- Reporting impacts effectively demonstrates how program volunteers:
 - deliver benefits and results to meet high priority issues and needs in Missouri communities
 - can be seen as valuable community resources that justify investment from public and private sectors

Marketing a University of Missouri Extension program

Although volunteers can be valuable resources to help spread the word about extension programs, they should work in partnership with a staff member to ensure proper use of MU Extension program logos and to follow extension branding guidelines. Staff should coordinate any marketing efforts through MU Extension's marketing coordinator.

Use of social media

Only current MU Extension employees may set up and maintain official University of Missouri Extension webpages and online groups created with the MU Extension WebTool application. Volunteers, club members, retirees, alumnus, students — either individually or as part of a committee — are welcome to participate in online groups created and maintained by MU Extension staff. They are also welcome to suggest content for webpages/online groups maintained by staff. However, to help protect MU Extension and its employees from potential lawsuits, MU Extension will not provide support to non-employees who want to create or maintain websites and online groups for extension. Go to MU Extension Social Media Guidelines at <http://extension.missouri.edu/staff/communications/socialmediaguidelines.aspx> to learn the most current policies.

5. *LINKS TO PROGRAM-SPECIFIC POLICY MANUALS*

- Master Gardener - https://mg.missouri.edu/pdf/Statewide_guidelines_II.pdf
 - Master Naturalist - <http://extension.missouri.edu/masternaturalist/mnoverview.aspx>
 - Youth Development - <http://uoeshare.ext.missouri.edu/share/MUCampus/4-H/Risk-Management/> — staff only
 - Regional Extension Council - <http://extension.missouri.edu/extcouncil/regional-guidelines.aspx>
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Credits

This resource is intended to be a living document. It will be reviewed and updated annually to meet the changing needs of the organization and our volunteers as a way to help you in your volunteer management efforts. University of Missouri Extension would like to thank the University of Maine Cooperative Extension Volunteer Development office for allowing us to adapt their Volunteer Policy Manual. Thanks to the MU Extension Volunteer Advisory Committee: Elaine Anderson, Kristy Baker, Patricia Barrett, Nathan Brandt, Mike Coffey, Alison Copeland, Tammy Gillespie, Dave Hileman, Tish Johnson, Megan Martin, Kristin Millikan, Shaun Murphy, Makele Ndessokia, Robert Pierce, Jennifer Schutter, Jody Squires and David Trinklein.

Updated by Eric Jackson, Extension Volunteer Specialist. Contact jacksonjamese@missouri.edu to report needed updates.