

Constructive Coaching of MU Extension Volunteers

Managing Volunteer Compliance

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This guide provides a consistent framework and constructive coaching process that enables University of Missouri Extension faculty and staff to ensure that volunteers follow the MU Extension Volunteer Code of Conduct while they facilitate MU Extension programs.

The purpose of this guide

Volunteers are an essential part of the MU Extension mission. They help extension faculty bring high-quality programming to Missourians. However, volunteering is a privilege, not a right. Occasionally, a volunteer may commit an infraction of the MU Extension Volunteer Code of Conduct and require constructive coaching in order to realign behavior with MU Extension policy to remain as a volunteer.

While facilitating MU Extension programs, volunteers must follow guidelines in the [MU Extension Volunteer Code of Conduct](#). Failure to uphold any standard of behavior listed in the volunteer code of conduct may result in constructive coaching by the MU Extension specialist who advises the volunteer or volunteer group. The scope of constructive coaching ranges from a verbal warning to dismissal of the volunteer from the MU Extension program. This guide outlines the steps the advising specialist must take to guide the volunteer back into compliance with the MU Extension Volunteer Code of Conduct.

Navigating the guide

This guide aligns with and expounds upon existing MU Extension statewide program manuals on volunteer policies and procedures (i.e. [Missouri Master Gardener Program Policies and Procedures](#); the [Missouri Master Naturalist Program Manual](#); the [Missouri 4-H Policies and Procedures Manual](#), and the [MU Extension Risk Management of Volunteer-Led Programs Manual](#)).

For quick reference, the following topics are included in this guide.

- **Definition and process** of the three levels of the *Constructive Coaching Protocol*
- [Appendix A](#) provides a **matrix that guides the decision of which level to initiate**, given the infraction of the code of conduct. The matrix is not meant to be complete, but it may serve as a reference for infractions not listed.
- Appendices [B](#) and [C](#) provide **suggested responses** to keep the constructive coaching discussion going when the volunteer begins to shut down.
- [Appendix D](#) contains a **communication record log template** for documenting phone and personal conversations related to the infraction.
- [Appendix E](#) provides **letter templates for outcomes** that can arise at various stages from following the *Constructive Coaching Protocol* to conclusion — from reinstatement of volunteer privileges to immediate termination.
- [Appendix F](#) contains the **MU Extension Volunteer Code of Conduct**.

Note: Based on the structure of the program, some MU Extension programs may have variations of the appeals process described on page 14. See the appropriate statewide program policy for details regarding the specific program area, if one exists: (i.e. [Missouri Master Gardener Program Policies and Procedures](#); the [Missouri Master Naturalist Program Manual](#); the [Missouri 4-H Policies and Procedures Manual](#), and the [MU Extension Risk Management of Volunteer-Led Programs Manual](#). If no process exists, contact the program director or program leadership team for guidance.

Definition of terms

For clarity and brevity, the following terms and acronyms will be used throughout the document.

- **Advising specialist** or **adviser** — is the MU Extension regional specialist directly supervising the named MU Extension program. The advising specialist plays a key role in determining when intervention is required to bring a volunteer back into compliance with the MU Extension Volunteer Code of Conduct. The specialist, along with extension volunteer specialist (EVS) and/or regional director (RD) and/or program director (PD), determine if the volunteer may or may not continue as an MU Extension volunteer, based on the available information.
- **EVS** — is the MU Extension volunteer specialist (or the Director of Risk & Volunteer Management). The EVS is the statewide HR staff specializing in volunteer development across all program areas in MU Extension.
- **Infraction** — is any behavior or action by the volunteer that violates the MU Extension Volunteer Code of Conduct, is not aligned with MU Extension's mission and mandates, or is contrary to the purpose and intent of the named program.
- **RD** — MU Extension regional director
- **CES** — Community Engagement Specialist
- **PD** — MU Extension program director
- **VPC** — is the volunteer personnel committee, which includes the advising specialist, the EVS, another specialist serving the volunteer's county and, at times, the RD.
- **VPIP** — is the Volunteer Performance Improvement Plan. This plan is created when the volunteer and advising specialist meet to guide the volunteer back into compliance with the MU Extension Volunteer Code of Conduct. The VPIP may be as short as one sentence or more elaborate, as the situation warrants. See [Appendix E](#) for the VPIP template and sample.
- **Volunteer(s)** — refers to all authorized MU Extension program volunteers.

What Is the Constructive Coaching Protocol?

MU Extension volunteers are crucial to the mission and execution of MU Extension programs. Their contributions to the state of Missouri each year is valued at over \$43 million. The *Constructive Coaching Protocol* is a process that recognizes the value of volunteers and helps MU Extension retain volunteers who have breached the code of volunteer conduct.

The *Constructive Coaching Protocol* has one main purpose — to give extension volunteers the opportunity and choice to remain in the MU Extension volunteer program. By combining consistent elements of coaching, performance improvement planning and progressive coaching steps, the *Constructive Coaching Protocol* ensures equitable treatment of all MU Extension volunteers. Once the advising specialist is aware of a purported breach of the [MU Extension Volunteer Code of Conduct](#), constructive coaching is initiated. Addressing the infraction(s) promptly is key to ensure an effective, timely resolution resulting in corrective action taken by the volunteer or — at the extreme — dismissal of the volunteer from the extension program. The components of the *Constructive Coaching Protocol* include **documentation**, **communication** and three levels of **progression**.

Documentation

When an advising specialist initiates constructive coaching, it is crucial to document every step of constructive coaching and chronicle the measures taken to curb the undesired behavior and the result of such measures — corrective action taken by the volunteer or refusal to comply. The documentation should include:

- Logs of face-to-face conversations and phone conversations
- Outcomes of those conversations
- Emails from the volunteer supporting the need of constructive coaching
- Minutes from meetings with the volunteer
- Eyewitness observations by the advising specialist
- **Only vetted** secondhand accounts by multiple persons witnessing the infraction(s) in question

A thorough file of documentation serves to refute potential claims of unfair treatment posed by the volunteer. Copies of all documentation are to be kept in a marked folder in a secure location at the MU Extension county office. Additionally, copies need to be securely transferred to the MU Extension volunteer specialist (EVS). Contact the EVS for more details.

Communication

Communication is essential at every step and should be documented. At the onset of observed or reported breach of the volunteer code of conduct, contact the volunteer immediately by phone or in person to gather more facts and to allow the volunteer to be heard. An initial, direct communication with the volunteer may clear up a misunderstanding or justify the need to begin constructive coaching. ([Appendix C](#) offers suggested language to use in response to a volunteer's refusal to communicate or denial.) Communicate with the Regional Director (RD), Community Engagement Specialist (CES) and the Extension Volunteer Specialist (EVS) at the onset of coaching and to update progress as necessary.

If the next step in constructive coaching calls for a certified letter to be sent to the volunteer, keep a copy of the letter in secured folder (see *Documentation* above) and send copies of the letter to the RD, CES and the EVS electronically or otherwise.

Planning for confidential meetings

There are times in the constructive coaching process when it is necessary to meet with the volunteer:

- The initial meeting to discuss the infraction
- The meeting to create a VPIP
- The dismissal meeting

In such cases, it is important to provide a safe, secure and confidential space. Include these key aspects of planning the meeting:

- Provide a room at the county extension office. Ideally, other staff members will be in the building, but not where details of the conversation can be overheard.
- For Level 2 and Level 3 meetings (detailed in the next section), arrange for an extension specialist (CES or otherwise) of opposite gender of yourself to be present during the meeting. Other options include the youth program associate (YPA) who serves the county, or the RD, if the circumstance warrants it. Do not involve office managers and county staff funded fully or partially by the county extension council.
- Review and have available printed copies of the MU Extension Volunteer Code of Conduct.
- Review the *Managing Negative Responses to Feedback* guide in [Appendix B](#).

Levels of constructive coaching

There are three levels of constructive coaching. Each level builds upon the prior level. If the volunteer fails to take corrective action at Level 1, initiate Level 2, etc. Note that the circumstance, the frequency and the nature of the infraction determine which level the advising specialist initiates. (See [Appendix A](#) for a matrix of infractions and which level of constructive coaching each infraction warrants.) At every level of the *Constructive Coaching Protocol*, remember:

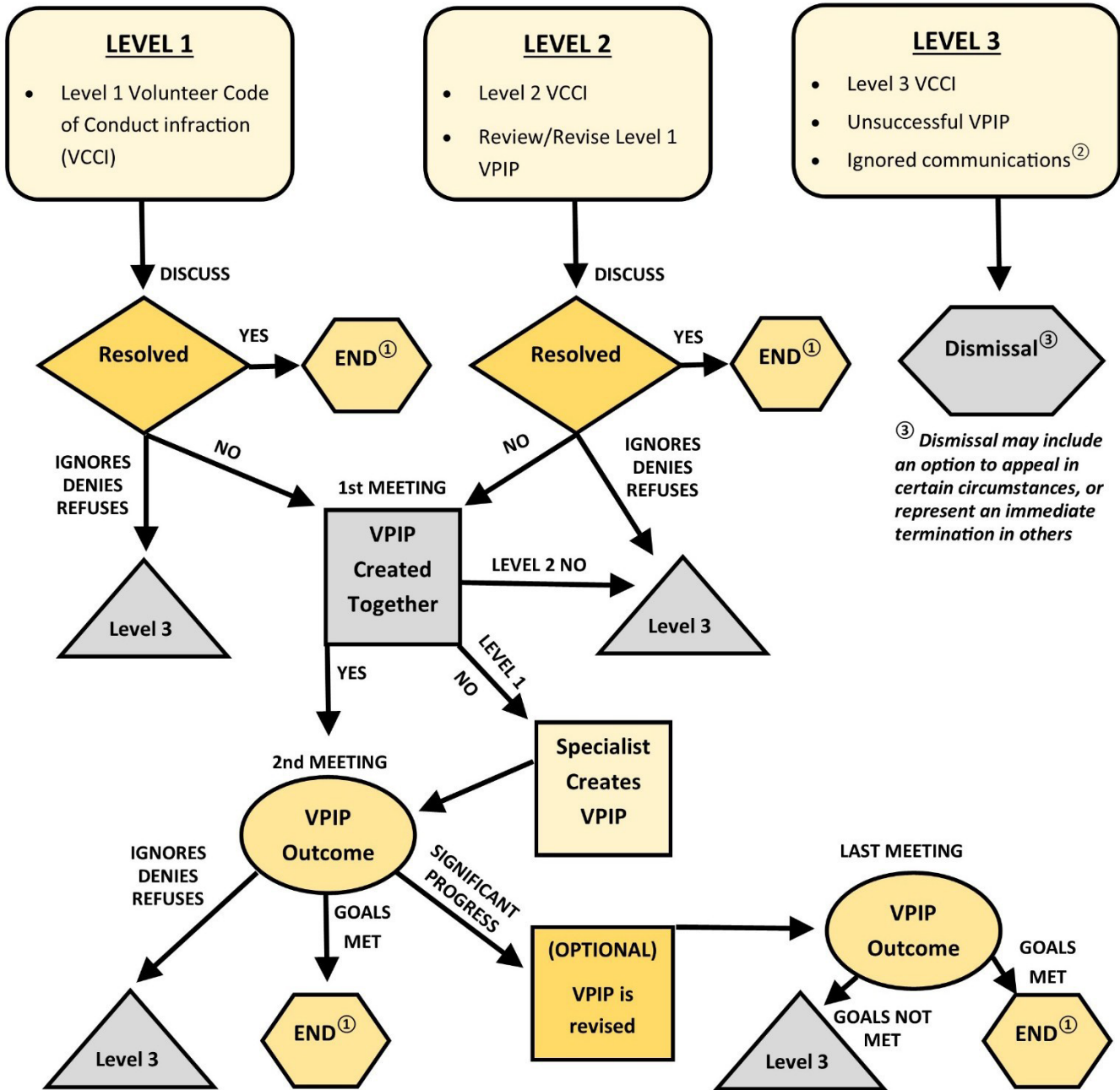
- Document all conversations with the volunteer and involved parties.
- Communicate with the RD and the EVS for guidance and to inform them of next steps.
- Communicate with the CES to inform of progress and actions taken.
- Documentation should justify the initiation of constructive coaching and the level of action taken.
- Keep all related documentation and copies of all letters in a secured folder at the MU Extension county office.
- At every level, have a copy of the MU Extension Volunteer Code of Conduct available. (See [Appendix F](#).)
- Keep all records confidential, sharing information only with appropriate personnel — EVS, CES and RD.
- Protect anonymity. Protect non-employee personnel (other volunteers, community partners, etc.) who bring forward information regarding the infraction of the code of conduct. If the volunteer in question asks, a proper reply is, “I must protect the confidentiality of those reporting

to me, just as I will respect the confidentiality of our conversations if I talk to others. I am not authorized to reveal names.”

- Reply to any inquiries from the community about the situation by stating, “Volunteer information, like employee information, is a confidential, personnel matter and cannot be discussed. Thanks for understanding.”
- All confidential coaching meetings should be held at the county extension office.

On page 6, a flow chart of the Constructive Coaching Protocol is followed by a detailed outline of each level and accompanying steps under each level. Steps within each level may have more than one potential outcome – the volunteer may agree to address the issue, deny responsibility for their action, or ignore all attempts by the specialist to communicate the concern. The Constructive Coaching Protocol follows a logical progression – if A occurs, go to B, or if X occurs, go to Y, and so on. The intention is that the advising specialist will know how to proceed at any step for any outcome.

MU EXTENSION VOLUNTEER CONSTRUCTIVE COACHING PROTOCOL



³ Dismissal may include an option to appeal in certain circumstances, or represent an immediate termination in others

Abbreviation List:

- VCCI—MU Ext. Volunteer Code of Conduct infraction
- VPIP—Volunteer Performance Improvement Plan

Notes Pertaining to MU Ext. Volunteers:

¹ Successful resolution may include a probationary period with periodic reviews

² Actively ignoring communication attempts by the advising MU Extension staff results in dismissal.

Level 1 of constructive coaching

Level 1 of constructive coaching is appropriate for minor infractions (see [Appendix A](#)). In an ideal outcome, the volunteer complies with the corrective action prescribed by the advising specialist. The successive levels detail how to proceed for both positive and negative outcomes. The steps below outline a path to follow, and the outcome of each step determines which step to take next.

- 1. Review all collected documentation** related to the purported infraction. Secondhand accounts should be thoroughly investigated and should indicate a high likelihood of occurrence before proceeding.
 - a. If there is not enough supporting information — for example, one report of an incident by another volunteer — pause the process and gather more information. Make a phone call and ask others to corroborate. Come back to Level 1 when the claim of an infraction is supported.
 - b. If the infraction is directly observed by the extension staff, and/or if secondhand accounts are verified, proceed to [step 2](#).

- 2. Contact the volunteer** in person or by phone to discuss the infraction. Personal communication may clear up a misunderstanding and solve the issue. Document the date, purpose and outcome of the phone conversation [see [Appendix D](#) for a communications log template]. Four possible outcomes may occur during the communication:
 - a. The volunteer acknowledges the mistake and the need to change the behavior that led to the infraction. If the purported infraction is not witnessed or reported within a 6-month period, or if the claim is verifiably inaccurate, assume the issue has been resolved. The volunteer retains active status. This concludes constructive coaching. Follow the conversation by sending letter template #18 found in [Appendix E](#).
 - b. The volunteer acknowledges the behavior and promises to take steps to prevent the infraction from happening again. If the purported infraction is witnessed or reported a second time within a 6-month period, proceed to [step 4.b](#).
 - c. The volunteer refutes the claim or asks for more detail. Proceed to [step 3](#).
 - d. The volunteer ignores or refuses to communicate with the advising specialist after three attempts, proceed to [step 4.b](#).

- 3. Details should never be discussed in an informal setting**, by phone or by email. Instead, keep the conversation focused on establishing a time for a face-to-face meeting. Set a date and time for a one-on-one meeting at the county extension office. Set a meeting date within one to two weeks of the conversation, if possible. See [Appendix C](#) for suggested responses if the volunteer refutes or denies wrongdoing during the initial conversation. Regardless of whether the volunteer is agreeable to meet or not, proceed to [step 4](#).

- 4. Send the appropriate certified letter** to the volunteer as indicated below. (See [Appendix E](#) for letter templates). During the conversation, if the volunteer is agreeable to meet, proceed to [step 4.a](#). If the volunteer refutes the purported infraction occurred, cannot be reached, or repeats the same (or similar) minor infraction in a 6-month period, proceed to [step 5.b](#).
 - a. Follow up the conversation by sending a certified letter to the volunteer confirming the meeting date and time. (Use [letter template #4](#).)

- b. Send a certified letter with a date and time for a meeting set by the advising specialist. (Use [letter template #5](#).)
5. After 2 to 3 days of receipt of the letter, the advising specialist should **contact the volunteer to set a meeting date**. Three possible outcomes are:
 - a. Contact is made and the volunteer agrees to the meeting date, time and location. Proceed to [step 6](#).
 - b. The volunteer cannot be reached. First, verify whether the volunteer is actively refusing to communicate. Talk with other individuals. Is the volunteer participating in current extension activities and meetings? Or, is the volunteer out of town, hospitalized or providing care for another person, for example?
 - i. If the volunteer is unable to be reached (vacation, hospitalized, etc.), cease communication and try again once the volunteer is available and repeat [step 5](#).
 - ii. The volunteer is able to respond to the letter and follow-up call, but refuses to communicate with the advising specialist, proceed to [Level 3](#).
 - iii. The volunteer actively ignores communication from the advising specialist. Proceed to [Level 3](#).
6. **At the meeting**, discuss the performance concerns and/or infractions. Focus on the infraction, not the personality of the individual (See [Appendix B](#) on *Managing Negative Responses to Feedback*). Summarize the gathered information documenting the infraction. Protect the confidentiality of all secondhand accounts. During the meeting, three possible outcomes will occur:
 - a. The meeting is productive. The volunteer acknowledging the need for remediation/change. Proceed to [step 7](#).
 - b. The volunteer denies committing the infraction, refutes the supporting information and/or refuses to acknowledge the need to change infractions. (See [Appendix B](#) on *Managing Negative Responses to Feedback*.) Proceed to [step 9](#).
 - c. The volunteer acknowledges the infraction, but refuses to take corrective action. Proceed to [step 9](#).
7. The **Volunteer Performance Improvement Plan**: During the meeting, the advising specialist and volunteer create a Volunteer Performance Improvement Plan (VPIP). (See [Appendix E](#) for a VPIP template and sample.) The advising specialist completes “1. Overall Expectations” either during or prior to the meeting, and guides the volunteer through the remainder of the document. There are two outcomes:
 - a. The volunteer cooperates and assists in drafting the VPIP. The draft may be handwritten. The advising specialist and the volunteer sign the VPIP and set a date for a follow-up meeting at least 30 days, but no more than 40 days, from the date of the meeting in progress. The advising specialist informs the volunteer that an official copy of the VPIP and a letter detailing the outcome and expectations will sent by certified mail within 3 days. This concludes the meeting. Proceed to [step 8](#).

- b. The volunteer halts the planning process before completion and refuses to continue. Proceed to [step 9](#).
8. **Mail a typed copy of the VPIP and letter:** After the volunteer receives the VPIP and certified letter detailing the corrective action needed, follow up with a summary of the purpose of the next meeting, which is to review progress on the VPIP. (See [Appendix E #9 VPIP](#) and [letter template #10](#)). Keep a copy of the VPIP on file. Proceed to [Level 2](#).
9. **The VPIP is not created:** The VPIP planning was not completed because the volunteer did not attend the planning meeting or halted the planning process. Conclude the meeting, if one is in progress. The advising specialist informs the volunteer that within one week from the date of the meeting, the information will be reviewed again, and the advising specialist will contact the volunteer to discuss next steps. Conclude the meeting. Proceed to [step 10](#).
10. **Advising specialist creates a VPIP:** Create a VPIP on behalf the volunteer, detailing the corrective action needed for the volunteer to come back into compliance. Mail certified letter summarizing the incident(s), meeting purpose, the outcome of the meeting, and include a copy of the VPIP detailing the purpose and expectation of the VPIP. (See [Appendix E #9 VPIP](#) and [letter template #11](#)). Proceed to [Level 2](#).

Level 2 of constructive coaching

Level 2 is initiated as a result of:

- The advising specialist and volunteer met at Level 1 and created an agreed-upon VPIP.
- The volunteer did not assist the advising specialist in creating a VPIP at Level 1.
- The infraction is of a more serious nature (see [Appendix A](#) for a matrix of infractions) and a VPIP needs to be created.

In each of these instances, proceed to [Level 2, step 1](#).

1. **Contact the volunteer by phone** to establish a meeting time or to confirm a meeting scheduled in Level 1. Do not communicate specific concerns through phone calls or email messages. The nature of the communication is determined by the following outcomes:
 - a. The volunteer and advising specialist worked together to create a VPIP in Level 1 and agreed upon a follow-up meeting date to review progress. Proceed to [step 4](#).
 - b. If Level 2 is the first time the advising specialist contacted the volunteer about the infraction(s), and the volunteer ignored three attempts to communicate with the advising specialist, proceed to [step 3.b](#).
 - c. If Level 2 is the first time the advising specialist contacted the volunteer regarding the purported infraction and contact was made, two outcomes may occur.
 - i. The volunteer refutes the claim of infraction(s), refuses to meet with the advising specialist or demands more details. The advising specialist concludes the conversation by informing the volunteer that the situation will be reviewed and further communication will come from the advising specialist in 1 to 2 weeks. Proceed to [step 2](#).

- iii. If the volunteer has made no progress toward the objective goals, proceed to [Level 3](#).
- c. **Level 2 VPIP meeting:** This is the first meeting with the volunteer. The purpose of the meeting is for the advising specialist and volunteer to complete a Volunteer Performance Improvement Plan (VPIP). (See [Appendix E #9 VPIP template](#).) The advising specialist completes “1. Overall Expectations” either during or prior to the meeting, and guides the volunteer through the remainder of the document. Two possible outcomes are:
- i. The volunteer cooperates and assists in drafting the VPIP. The draft may be handwritten. The advising specialist and the volunteer sign the VPIP and set a date for a follow-up meeting at least 30 but no more than 40 days from the date of the meeting in progress. The advising specialist informs the volunteer that an official copy of the VPIP and a letter detailing the outcome and expectations will be sent by certified mail. This concludes the meeting. Proceed to [step 5](#).
 - ii. The volunteer refuses to participate in the VPIP planning or halts the planning process before completion. (See [Appendix B](#) on *Managing Negative Responses to Feedback*.) The advising specialist informs the volunteer that within one week from the date of the meeting the information will be reviewed again, and the advising specialist will contact the volunteer by the end of that time to discuss next steps. Conclude the meeting. Proceed to Level 3.
5. **Mail the Level 2 VPIP and follow-up:** Draft a final copy of the VPIP. Send an official copy along with a certified letter (see [Appendix E #9 VPIP](#) and [letter template #10](#)) explaining next steps. Within 2 to 3 days of receipt of the letter and VPIP, the advising specialist will contact the volunteer by phone to confirm understanding of the expectations, the needed corrective action and the need to meet again after the probationary period on the designated date. Possible outcomes of the phone call include:
- a. Contact is made, and the volunteer is agreeable to work toward the VPIP goals and to meet on the agreed-upon follow-up meeting. Proceed to [step 6](#).
 - b. Contact is made, and the volunteer refuses to follow the VPIP. Proceed to immediate termination, [Level 3.5.b](#).
 - c. The volunteer actively ignores further communication with the advising specialist. Proceed to immediate termination, [Level 3.5.b](#).
6. **Level 2 VPIP follow-up meeting:** The purpose of this meeting is to review the volunteer's progress toward reaching the goals of the Level 2 VPIP after a 30- 40-day probationary period. Two to 3 days prior to the meeting, the advising specialist confirms the details with the volunteer by phone. If the volunteer cannot make the date, other arrangements to meet need to be made prior to the meeting. Outcomes include:
- a. **No meeting:** The volunteer ignores communication from the advising specialist; is able to but does not attend the agreed upon meeting; or verbally refuses to attend the meeting. Proceed to immediate termination, [Level 3.5.b](#).
 - b. The **volunteer reached the expectation goals**, and no further corrective action is needed. The volunteer will remain on probationary status for 12 months and may still function as an MU Extension volunteer during that period. Proceed to [step 7.b](#).

- c. The **volunteer shows progress** toward the Level 2 VPIP goals. The advising specialist exercises one of the following options at the discretion of the advising specialist:
 - i. If the meeting is the first review of a Level 2 VPIP, the advising specialist can modify the goals as appropriate and establish a last 30- 40-day probationary period while the volunteer works toward the improvement goals. Set a date for a last Level 2 follow-up meeting and send the revised copy of the VPIP and details of the meeting by certified mail. Repeat steps 5-6 one final time.
 - ii. If this is the second review of a Level 2 VPIP and the volunteer has made limited progress, proceed to Level 3.
- d. If the volunteer has made no progress toward the objective goals, proceed to immediate termination, Level 3.5.b

7. **Reinstatement, probation or dismissal proceedings:**

- a. The **evidence was not conclusive** that an infraction occurred or the claim was false. For the time being, the volunteer retains active status. The advising specialist informs the volunteer of the decision and continues to monitor the situation.
 - i. If the purported infraction does occur within a 12-month period proving the original allegation to be true, proceed to Level 3. Use [letter template #12](#) in [Appendix E](#).
 - ii. If it does not occur in a 12-month period, assume the issue is resolved and the probationary status removed. This concludes constructive coaching. Use [letter template #13](#) in [Appendix E](#).
- b. The **volunteer took the corrective action** steps needed to come back into compliance with the code of conduct. The volunteer retains active status on a probationary period of no more than 12 months. [Recall: If a VPIP was created in Level 1, the volunteer has already served 6 months of the total 12-month probation.] During the probation, the advising specialist continues to monitor and/or check in with the volunteer.
 - i. The volunteer completes the 12-month probation period with no further infractions. The volunteer retains active status. The advising specialist calls to inform the volunteer that the probation status is lifted. This concludes constructive coaching. Use [letter template #13](#) in [Appendix E](#).
 - ii. The volunteer commits the infraction at least once in the 12-month probation period. Proceed to Level 3. Use [letter template #12](#) in [Appendix E](#).

Level 3 of constructive coaching

The Level 3 process begins when the volunteer has refused to take corrective action needed to come back into compliance with the MU Extension Volunteer Code of Conduct, or has committed an infraction warranting immediate dismissal (see [Appendix A](#) for a matrix of Level 3 infractions). While instances of severe infractions are rare, it is important to recognize each and move promptly to protect the extension program, those involved in the program and the reputation of MU Extension in the community. It is important to note that at every step in the constructive coaching model, the individual made decisions

that determined the next course of action. Reaching Level 3 indicates the volunteer has chosen to leave the MU Extension program. (See page 15 for [Additional Dismissal Situations.](#))

At least one of following must occur for the advising specialist to initiate Level 3 constructive coaching:

- The **volunteer actively ignored communications** from the advising specialist. At Level 1 or 2, the advising specialist has made at least three attempts to reach the volunteer and at least one certified letter requesting to meet with the volunteer was delivered.
- Contact was made and the **volunteer refused to meet**. Either the advising specialist reached the volunteer by phone, or the volunteer contacted the advising specialist in response to a letter received. In either instance, the volunteer refused to acknowledge the problem and the need to meet with the advising specialist.
- The **volunteer has not met the goals** established in the VPIP. At Level 1 or 2, the advising specialist and the volunteer met to create an improvement plan for the volunteer (the VPIP), or the advising specialist created the VPIP on behalf of the volunteer. Either the volunteer refuted the substantiated evidence of the infraction, refused to take part in the VPIP planning process or failed to take the corrective action needed to come back into compliance with the code of conduct.
- The **volunteer committed a Level 3 infraction** (see [Appendix A](#) for a matrix of Level 3 infractions).

1. After consultation with the RD and EVS, the advising specialist follows the appropriate path:
 - a. For severe infractions (see [Appendix A](#)), document the infraction with as much detail and eyewitness accounts as available. Proceed to immediate termination, [Level 3.5.b](#) (step 5.b).
 - b. If the volunteer refused to meet at Level 1 or 2, or actively ignores communication attempts at any level, proceed to immediate termination, [Level 3.5.b](#) (step 5.b).
 - c. If the volunteer failed to achieve the goals and objectives of a Level 2 VPIP, proceed to immediate termination, [Level 3.5.b](#) (step 5.b).
 - d. A written request for a final, in-person meeting is sent to the volunteer. Note: Communication of specific concerns should not be handled via phone or email messages. Use [letter template #14](#) in [Appendix E](#). Proceed to [step 2](#).
2. Official request to meet: After 2 to 3 days upon receipt of the letter, the advising specialist attempts to contact the volunteer. At least one attempt should be by phone. (See [Appendix C](#) for suggested responses should the volunteer refute or deny wrongdoing during the conversation.) Three outcomes may occur:
 - a. Contact is made, and the volunteer is agreeable to meet. The advising specialist and volunteer set a meeting date and time within two weeks of the phone conversation to be held at the MU Extension Office in [County Name] County. Proceed to [step 3](#).
 - b. Contact is made, and the volunteer refuses to meet or refuses to acknowledge the infraction. Proceed to immediate termination [Level 3.5.b](#) (step 5.b).

- c. The volunteer actively ignores communications from the advising specialist. Proceed to immediate termination [Level 3.5.b](#) (step 5.b).
3. Plan the dismissal meeting. Privacy is of utmost important at this meeting. Prepare for the meeting ([see page 4 for guidance](#)). Proceed to [step 4](#).
4. Level 3 meeting: The purpose of the Level 3 meeting is twofold:
 - To acknowledge the volunteer service to MU Extension
 - To dismiss the volunteer from the extension program

Two to three days prior to the meeting, confirm the details with the volunteer by phone. If the volunteer cannot make the date, other arrangements to meet need to be made prior to the meeting. Outcomes include:

- a. The volunteer ignores communications from the advising specialist, refuses to attend the meeting or attends the meeting and leaves abruptly. Proceed to immediate termination [Level 3.5.b](#) (Step 5.b).
 - b. The volunteer attends the meeting. Be professional but direct when communicating with the volunteer and thank the volunteer for the service to date. Inform the individual that their status as an MU Extension volunteer has been rescinded effective immediately. (See [Appendix B](#) on *Managing Negative Responses to Feedback*). Conclude the meeting. Proceed to step 5.
5. Mail the letter of dismissal from the program. The advising specialist sends a confidential, certified letter indicating the volunteer's active status has been rescinded. (See [Appendix E](#) for letter templates.) Send the appropriate dismissal/termination letter as indicated below:
 - a. If the volunteer attended the meeting through the conclusion, send [letter template #15](#) in [Appendix E](#). The letter summarizes the outcome and the right to request an appeal in writing within 15 days of the meeting. Proceed to [step 6](#).
 - b. Immediate removal: Use the appropriate letter template found in [Appendix E](#). The mailing of the letter is the conclusion of the Constructive Coaching Protocol. There is no next-level appeal process. The individual is no longer an MU Extension volunteer and cannot represent MU Extension in the county or throughout the state of Missouri.
 - i. The volunteer failed to achieve the goals and objectives of a Level 2 VPIP. Use [letter template #12](#).
 - ii. The volunteer committed a Level 3 infraction warranting immediate removal (see [Appendix A](#) for a matrix of Level 3 infractions). Use [letter template #17](#) in [Appendix E](#).
 - iii. The volunteer refused to meet; was able but chose not to attend a scheduled meeting; or attended the meeting and left prior to the conclusion of the meeting. Use [letter template #16](#).
 6. The appeals process: From step 5.a, the dismissed volunteer is entitled to an appeal, only if a written request from the former volunteer is received by the advising specialist within 15 days of receipt of letter of dismissal.

- a. The volunteer does not reply within 15 days of receiving the letter of dismissal. Proceed to immediate termination, [Level 3.5.b](#). This concludes the Constructive Coaching Protocol. There is no next-level appeal process. The individual is no longer an MU Extension volunteer and cannot represent MU Extension in the county or throughout the state of Missouri.
- b. The volunteer requests an appeal. Proceed to [pages 15-16](#) for more information regarding the [appeals process](#) and the Volunteer Personnel Committee (VPC). Upon receipt of the request of appeal, use [letter template #7](#) found in [Appendix E](#).

Note: Based on the structure of the program, certain MU Extension programs may have variations of the appeals process described on [page 15](#). See the appropriate statewide program policy for details regarding the specific program area, if one exists: [Missouri Master Gardener Program Policies and Procedures](#); the [Missouri Master Naturalist Program Manual](#); the [Missouri 4-H Policies and Procedures Manual](#), and the [MU Extension Risk Management of Volunteer-Led Programs Manual](#). If no process exists, contact the program director or program leadership team for guidance.

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 of immediate removal or suspension should be made at the county level after discussion with the RD and EVS. See [letter template #17](#) in [Appendix E](#). Inform the CES.

- **Removing youth volunteers**

Generally, there is no procedure for removing a 4-H'er from membership. However, if a young person is serving in a volunteer role similar to one that an adult might have, then it is possible to follow the same coaching, and, if warranted, the same removal steps as with adult volunteers. Letter templates [#14](#), [#15](#), [#16](#) or [#17](#) in [Appendix E](#) may be modified for use in this circumstance.

- **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., extension 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. Letter templates [#14](#), [#15](#), [#16](#) or [#17](#) in [Appendix E](#) may be modified for use in this circumstance.

MU Extension volunteer appeals process

If an appeal option is granted, the MU Extension specialist overseeing the county extension program (the program adviser) mails a certified letter notifying the volunteer of the dismissal decision and of the right to appeal. See [Appendix E](#) for [letter template #15](#) *Dismissal Letter with Appeal*. The dismissed volunteer must send a written appeal within 15 days of receipt of the notice to the program adviser. Failure to send

a written appeal request within 15 days by the dismissed volunteer should be considered as withdrawal from the extension program.

Upon receipt of the appeal request, the program adviser requests assistance from extension leadership to convene a Volunteer Personnel Committee (VPC). Depending on the extension program, the VPC will include state program leadership, the program or academic director and/or the extension volunteer specialist (EVS). See the statewide program policy for more details regarding the specific program area, if one exists. ([Missouri Master Gardener Program Policies and Procedures](#); the [Missouri Master Naturalist Program Manual](#); the [Missouri 4-H Policies and Procedures Manual](#), and the [MU Extension Risk Management of Volunteer-Led Programs Manual](#)).

The VPC is convened within two weeks of the dismissal letter being sent. The dismissed volunteer and VPC meet, in person, at the county extension office. Unless circumstances mandate otherwise, the dismissed volunteer may not bring any other persons to attend the meeting. The VPC listens as the dismissed volunteer presents the case for reinstatement.

At the conclusion of the meeting, the VPC renders a decision in a closed-door session, and the dismissed volunteer is informed via certified mail within one week of the VPC's decision. Refer to [Appendix E](#) letter templates [#8](#), [#12](#) and [#13](#) for possible outcomes — dismissal or reinstatement. The letter will be signed by the EVS first, followed by the members of the VPC, and mailed from the county extension office.

Unless stated otherwise, the decision of the VPC is final. Note: Based on the structure of the program, certain extension programs may have variations of the appeals process described in this guide. See the appropriate statewide program policy for details regarding the specific program area, if one exists: [Missouri Master Gardener Program Policies and Procedures](#); the [Missouri Master Naturalist Program Manual](#); the [Missouri 4-H Policies and Procedures Manual](#), and the [MU Extension Risk Management of Volunteer-Led Programs Manual](#). If no process exists, contact the program director or program leadership team for guidance.

As with the *Constructive Coaching Protocol*, it is crucial to document every step in the appeals process. Copies of all communications, including all certified letters sent to the dismissed volunteer and the dismissed volunteer's correspondence, need to be held at the county extension office. Additionally, RDs, PDs and the EVS should receive copies of the certified letters sent to the dismissed volunteer. A copy will be filed in a secure location in the county office. Consult the CES for best means of secure storage.

MU Extension volunteer appeals process

Dismissed 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 extension volunteer specialist.



The Volunteer Personnel Committee (VPC) is convened. Dismissed volunteer and VPC meet in person so the volunteer explains his or her perspective on why she or he should be reinstated.

The VPC renders a decision in a closed-door session, and the dismissed volunteer is informed via certified mail within one week of the VPC's decision.



Unless stated otherwise, the decision of the VPC is final.

Note: Certain extension programs may have variations of the appeals process described. Consult the appropriate statewide program policy for details regarding the specific program area, if one exists [Missouri Master Gardener Program Policies and Procedures](#); the [Missouri Master Naturalist Program Manual](#); the [Missouri 4-H Policies and Procedures Manual](#), and the [MU Extension Risk Management of Volunteer-Led Programs Manual](#). If no process exists, contact the program director or program leadership team for guidance.

Appendix A

Levels of constructive coaching matrix

The matrix on the following pages serves as a guide with examples of infractions of the [MU Extension Volunteer Code of Conduct](#) and the corresponding level of the Constructive Coaching Protocol to initiate.

Note: The matrix of possible infractions is not exhaustive. The ultimate decision of the course of coaching falls to the county or regional specialist who has oversight of the extension program. The MU Extension volunteer specialist is available to assist in determining the appropriate course of action.

The following considerations and hypothetical examples illustrate the decision-making process:

Date of incident: For example, a DUI (Driving Under the Influence) within five years of a volunteer's application may warrant adding certain restrictions to the volunteer's role (i.e., the volunteer may not be allowed to drive other volunteers or youths), or the recent DUI may necessitate removing the volunteer from the MU Extension program immediately. However, if an individual received a DUI 15 years ago and that is the only offense, the risk of accepting this individual as a volunteer is low.

A pattern, but not in recent years: If an individual has a record of repeated DUIs in the past 15 years, but in the last five years has received no DUIs, it might be possible to accept them as a volunteer with the restriction that they will never be allowed to transport non-family members of any extension program.

Habitual pattern of concern: If an individual has repeated DUIs up to the time of applying to be an extension volunteer, he or she may be considered to show a habitual pattern, which points to a denied application.

Severity: Certain infractions justify denying the volunteer application or termination of an active volunteer. Zero-tolerance, non-negotiables include:

- Discrimination of any kind
- Sexual assault
- Threat of, or acts of, physical violence to another

Infractions Involving minors: Infractions involving abuse (all kinds), sexual misconduct of any kind, or neglect of a minor, necessitates the witness fulfill duties as a *mandated reporter*. In cases of physical or sexual abuse, the witness should call law-enforcement authorities, too. Infractions that involve providing minors with illegal substances — alcohol to an individual under 21, any form of tobacco under the age of 18, and any illegal drugs, intoxicating substances (legal or not), and non-prescribed medications — necessitate the witness call the law-enforcement authorities.

MU EXTENSION Volunteer Code of Conduct infractions	LEVEL 1	LEVEL 2	LEVEL 3 with appeal option	LEVEL 3 immediate termination
Single instance of witnessed or verified verbal abuse	X			
Two to three instances of witnessed or verified verbal abuse within a 6-month period		X		
Four or more instances of witnessed or verified verbal abuse within a 6-month period			X	
Financial management error — first verified mistake (non-intentional)	X			
Financial management error — second verified mistake (non-intentional)		X		
Financial management error — first verified intentional misappropriations (intentional)				X
Two vehicular accidents in past 12 months while performing duties as MU Extension volunteer. (Volunteer is not at fault)		X		
Two accidents in past 12 months when at fault while performing duties as MU Extension volunteer		X		
Charged with DWI or DUI in past 12 months while performing duties as MU Extension volunteer			X	
Willful destruction or defacement of property			X	
Indecent or immoral conduct				X
Falsification of information, including forgery, omission, or providing misleading information				X
Physical violence or threat of violence toward another				X
Conflict of interest between assigned MU Extension volunteer role(s) and personal business interest – For example, using MU Extension brand and logo for financial gain in unauthorized capacity; charging a fee for services rendered while acting as an MU Extension volunteer.			X	X (e.g., submitting a grant proposal on behalf of a named extension program without consent of advising specialist)
Breach of confidentiality, unauthorized possession, use, copying or reading of any confidential information to unauthorized persons			X (e.g., proved to be unintentional)	X (intentional)

Presenting oneself as an extension volunteer in an unauthorized role, or attempting to implement management or policy decisions that are inconsistent with, or in direct violation of, MU Extension program policies				X
Theft, unauthorized possession, use or transfer of assets, property or another person's property; or, in any manner defrauding the organization of its assets for any reason, or by any means, regardless of value				X
Possession, use, being under the influence, sale, distribution or unlawful manufacture of illicit drugs or alcohol; or misuse or abuse of prescribed or over-the-counter drugs while performing MU Extension volunteer duties				X
Driving under the influence while conducting business for extension, including carpooling				X
Conviction of a felony within last five years				X
Conviction of a felony that includes element of violence, regardless of time				X
Listed on national or state sex offender list				X
Listed on national or state child abuse list				X
Willful violation of Missouri or federal laws				X
Crime involving force or threat of force within last 10 years				X
Any crime in which sexual relations is an element, regardless of time				X
Conviction involving controlled substances within last five years				X
Cruelty-to-animals conviction within 10 years			X (e.g. a lesser or one-time offense)	X (e.g. a felony conviction or pattern of minor offenses)
Any criminal offense that causes direct harm to a child, regardless of time				X
Previous dismissal as volunteer from any Missouri county, regardless of date				X
Intentional discrimination of any kind			X	X (intentional bias or discrimination)

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APPENDIX B

Managing negative responses to feedback

Feedback is important. Volunteers and employees want to know if they are doing a good job, and, if not, what changes should be made. However, people may respond to feedback on performance or behavior negatively. It is important to focus on the behavior that is negatively affecting performance, and not the person. The behavior, after all, can be changed. The table below highlights the most common negative response tactics and how program supervisors should address each response. This is not intended to be an exhaustive list. The example responses given may be modified to address any number of negative responses.

Beware of a powerful three-letter word: "but." Following a positive statement with the word "but" negates the positive statement. Doing so may make the recipient of feedback feel defensive. Instead, avoid using the negating words such as "but, however" and "yet" — and use "and" instead.

For example, consider the difference in meaning and interpretation of each of the following: “You are really great at x, *but* you really need to work on y,” versus, “You are really great at x, *and* if you keep working at y, you will be even better.” The stated need for improvement is the same — improve on y — and the latter of the two statements is easier to hear. It acknowledges the positive and states an attainable change to empower the recipient to grow.

Each negative response 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. Note in some examples the intentional use of ‘and’ instead of ‘but.’

Volunteer response to feedback	Suggested supervisor response
<p>Stonewalling Volunteer blocks or refuses to listen to feedback; disengages. Examples of the tactic include silence, tuning out, monosyllabic responses (“No”), changing the subject and talking under one’s breath.</p>	<p>Acknowledge that the volunteer disagrees: <i>“I see this is difficult to address, <u>and</u> we need to before moving forward”</i> or, <i>“I want to help, <u>and</u> we need to communicate to make that possible.”</i></p> <p>Restate your position: <i>“As I mentioned, when you (engage in behavior), others cannot”</i></p> <p>Take a break. <i>“This would be a good time to take a 5-minute break. We do need to talk about this and determine a workable solution before moving forward.”</i></p>

<p>Excuse-making/defensiveness 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>For example, "Yes, I sometimes get upset at meetings, but when X does Y, I have no choice." This statement serves two purposes: It sets the one making the statement out to be a helpless victim AND attempts to transfer the focus of the discussion on to another.</p>	<p>Acknowledge the "yes" portion. Repeat that portion of the response, then substitute your conclusion for the "but" statement. Describe the proper behavior. Example responses might include:</p> <p><i>"Yes, you do/did get upset at the meeting(s), and how do you think the outcome of the meeting would have been different if you"</i></p> <p><i>"I am with you now (X is not). I am here to have a discussion with you. How do you think the meeting would be different if you ..."</i></p> <p><i>"We are not here to talk about X. We need to discuss what you CAN control."</i></p>
<p>The retaliatory exchange AKA "The Topper" — The volunteer responds to feedback by criticizing the criticizer. Interaction becomes a mutual "put down" session. This tactic shifts the blame off the recipient and onto the one offering feedback.</p> <p>For example, "I would not be in this situation if you would have ..."</p>	<p>Remember, it takes two to play tug-of-war, and one of the two will be dragged into the mud. Don't pick up the rope. Do not argue. If necessary, acknowledge the negative statement and redirect the conversation back to the individual.</p> <p><i>"While it might be true that I (am/do) X, we are here to discuss what you can do/control next time Y happens."</i></p>
<p>Avoidance and withdrawal The volunteer isolates himself or herself from the criticizer. This behavior deprives the individual of any benefits of the feedback. It consists of a physical distancing from the criticizer.</p>	<p>Continue to attempt communication with the volunteer to initiate or continue dialogue. Examples of language to include on voice mail, letter or by email may include:</p> <p><i>"I need to hear from you. Together we may be able to find a workable solution. Please understand, if we cannot meet for a face-to-face discussion, we cannot move forward, and that may impact your status as a volunteer."</i></p> <p>It is highly recommended that facts about the incident/behavior are not put in email, letter or left on voicemail. This guarantees two things — confidentiality is protected, and what you said or wrote cannot be used against you. Encourage the person to contact you by not giving any details of the issue.</p>

<p>Superficial acceptance Agrees with the criticizer, but no evidence of change in behavior or performance is evident. This is a distancing technique. Feigning acceptance of responsibility is a means to quickly conclude a difficult conversation.</p>	<p>If no change is forthcoming, clearly state the consequences of non-performance in private, and then take action. If the superficial acceptance is followed by avoidance, address as you would the avoidance and withdrawal response.</p>
<p>Interfering emotions Reacts to criticism through displays of anger, crying and other forms of emotion as a way to stop the criticism. These emotional outbursts may be genuine or contrived. The response to either is the same.</p>	<p>Take a break, offer support, but <u>do not</u> stop the interaction.</p> <p><i>“Let’s take 5-minutes, and then return to the conversation.”</i></p> <p><i>“This would be a good time to take a 5-minute break. We do need to talk about this and determine a workable solution before moving forward.”</i></p>

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APPENDIX C

Initial communications with volunteers

It's important to begin the *Constructive Coaching Protocol* with personal communication — the first step to making progress in the right direction. If a letter is the first form of communication the volunteer receives, the chances of a positive outcome may quickly diminish. However, contacting the volunteer who is in breach of the Code of Conduct may seem daunting. This chart includes possible responses to a number of reactions the volunteer may have when contacted initially.

Note: If communication attempts are ignored by the volunteer, refer back to the [Levels of Constructive Coaching on page 4](#).

Initial contact with a volunteer in purported or proven infraction of the MU Extension Volunteer Code of Conduct is manageable if you have a clear purpose for the call and stick to the main points you seek to convey. The purpose of the initial contact is to gauge:

- The volunteer's level of awareness of the breach of the code of conduct
- The willingness to correct behavior, if needed

Create a list of items you are able to talk about. This serves as a mental reminder of the things you should not discuss over the phone. For instance, we must protect the confidentiality of all secondhand witnesses to the infraction. An example of how to initiate contact follows:

“Good afternoon, [Name of volunteer]. This is [your Name]. I want your input about something that happened on [date] at [place]. I was not able to attend. After the event, it was reported that you [fill in the blank]. Can you tell me what happened?”

If the volunteer is cooperative and forthright, a Level 1 infraction may be cleared up, or, in other cases, an agreed-upon meeting date and time will be established.

Volunteer responses that allow the conversation to continue may include: “No, I wasn’t aware that was a problem,” or “I will be sure that never happens again,” or “Yes, I did, but I did so because of x, y, z.”

If a meeting is warranted, the advising specialist’s reply may be, “We need to talk about this further. Not by phone, though. Would you be available to meet on [date] at [time] at the MU Extension office in [County Name] County? I can go over more details in person.”

At any point during the initial contact, the volunteer may attempt to shut down the conversation. The following table illustrates a volunteer's attempts to shut down the dialogue and examples of replies the advising specialist can make to keep dialogue open. These attempts and replies are not exhaustive, but may serve as a reference point for similar reactions.

Volunteer reaction to initial contact	Suggested replies for the advising specialist
<p>"I did not do it!" This is denying any wrongdoing. It may be followed by an attempt to shift the blame to another or assertions that the allegations are not true.</p> <p>An example of a potential lie: <i>"How could I? I did not have access to X."</i></p> <p>An example of shifting blame: <i>"Y did it, not me! I just happened to be there so I got blamed."</i></p>	<p>Do not take the bait. Do not offer rebuttals or evidence to the contrary of the response. Assuming the allegations have been proven to be valid, continue to establish a meeting date to discuss next steps. For example:</p> <p><i>"The (phone/hallway) is not the best place to discuss what needs to happen next. When can we meet to talk further?"</i></p> <p><i>"Naturally, I cannot discuss Y. You and I need to meet to discuss what needs to happen next."</i></p>
<p>"It is not my fault!" This, too, is an attempt to shift blame, perhaps to another or to mitigating circumstance. (If blame is being shifted to another, see the previous table entry.)</p> <p>For example, <i>"X happened because you didn't give me Y."</i></p>	<p>Keep the focus of the conversation on the volunteer. Acknowledge the true part of the statement, and avoid defending your actions if they are called into questions.</p> <p>For example, <i>"It is true I did not give you Y. Let's meet so we can discuss X and determine how best to prevent it in the future."</i></p>
<p>"I am the victim!" A powerless person feels she or he has no ability to change the environment or personal behavior, therefore bears no responsibility for behavior.</p> <p>For example, <i>"X is so difficult to talk to, so I cannot work with X."</i></p>	<p>Turn the conversation back to the volunteer. Reply affirming that, yes, the individual does have power or control, and press forward with setting a meeting date.</p> <p>For example, <i>"We are not talking about X. I want to discuss what you can do ... what you can control in similar, future situations. When can we meet to discuss this?"</i></p>

<p>Denial — It’s more than a river in Egypt. Denial is an attempt to shut down the conversation. For instance, <i>“If I say that I didn’t do X, then what is the need to talk about it?”</i></p> <p>For example: <i>“What are you talking about? I have never done X. I always do Y.”</i></p>	<p>Offer expectations of what you want the individual to do, not a list of past examples of behavior. The latter is a trap and opens the door to a lengthy conversation of picking apart or justifying past actions. Keep it short. The expectations you state infer what behavior has not been seen.</p> <p>For example: <i>“For the betterment of the program, I expect that all members are welcome to do X. I would like to discuss how you can help accomplish that.”</i></p>
<p>“Who told on me?”</p> <p>If I can identify who brought up the allegation, I can pick apart their credibility or bully them into taking back what they said.</p> <p>For example: <i>“I want to know who brought this up. Was it X? Was it Y? I bet it was Z. They are all against me.”</i></p>	<p>The best response is to state you cannot jeopardize the confidentiality or anonymity of anyone bearing witness to the infraction.</p> <p>For example, <i>“I cannot discuss anything that jeopardizes the confidentiality of another. When we meet, we can discuss a detailed plan of moving forward.”</i></p>
<p>“I need to know now!”</p> <p>To short-circuit the constructive coaching process, the volunteer asks what they need to do so the conversation can end. The volunteer wants to be done with it, and feels the quickest answer is the best.</p> <p><i>“Just tell me what I need to do, and I will do it, okay?”</i></p>	<p>Keep to the original plan — details, facts and past performance should not be discussed over the phone. Instead, conclude the conversation by setting a date to meet.</p> <p>For example, <i>“A phone or email is not the best means to have a discussion. When we meet in person, we can discuss what needs to happen to move forward.”</i></p>
<p>Afraid of commitment</p> <p>On the surface, non-committal statements such as, <i>“Whatever you say,”</i> or <i>“I’ll see what I can do”</i> may give one hope that the condition or requirement will be met. However, non-committal statements should be interpreted as noncompliance. It is a delay tactic meant to sidestep the issue and end the conversation.</p>	<p>Repeat your previous request. Settle only for “yes” or “no”. You may have to repeat more than once so that the person understands the question cannot be sidestepped.</p> <p>For example: <i>“I need to know for certain if you will attend the meeting on (date) at (time). It’s important that we meet.”</i></p> <p>Or, simply put, <i>“Is that a yes or a no?”</i></p>

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APPENDIX D

Confidential communication log

Constructive coaching requires attention to documentation. It is crucial to carefully document every step of constructive coaching in order to show measures that were taken to curb the undesired behavior and the results of these measures. Printed copies of emails and copies of letters — both sent and received — are essential records and should be included in the volunteer's folder. Summaries of phone and face-to-face conversations and records of unsuccessful attempts to communicate need to document with detail, as well. Documentation should be factual only. Emotionally charged language or personal opinions should be omitted. Consider the documentation.

Recommended: Example of Documented Communications

Date, Time and method of Communication	Description of volunteer's observable behavior(s)	Staff response, including conversation details, and outcome
1/15/2020. 4 p.m. Phone call	(Name1) was observed interrupting another 4-H volunteer's (Name2) comment during a club leader's meeting held at the local extension office.	During the phone call, (Name 1) indicated that (Name 2) sent an email to other 4-H volunteer leaders "challenging" (Name1)'s ability to lead. Questioned how (Name1) became aware of the email. (Name1) replied that a friend (Name3) forwarded the email. I asked for a copy of the email either printed or forwarded to my account.
1/16/2020. 10 a.m. Email received	Received copy of forwarded email sent from (Name3) to (Name1). The email in question was originally sent from (Name)'s account.	
1/16/2020. 2 p.m. Phone call		Contacted (Name2) for clarification by phone, etc.

NOT Recommended: Example language to avoid in documentation.

Date, Time and method of Communication	Description of volunteer's observable behavior(s)	Staff response, including conversation details, and outcome
1/15/2020. 4 p.m. Phone call	(Name1) was rude to (Name2) during a club leader's meeting held at the extension office.	During the phone call, (Name 1) blamed (Name 2) for sending an inappropriate email to other 4-H volunteer leaders. (Name1) was irate during the call.

A template for recording the outcomes of personal and confidential communications follows.

Confidential communication log

Volunteer Name _____ County _____

(This document should be kept in a locked file.)

 (Return to Level [1](#), [2](#), [3](#))

Date, time and method of communication	Description of volunteer’s observable behavior(s) Volunteer response, event details and names of other parties involved.	Staff response, including conversation details, and outcome Write “see attached” if you are attaching copies of emails, screenshots, letters, etc.

APPENDIX E

Volunteer communications letter templates

(Return to Level [1](#), [2](#), [3](#))

#1 Acceptance letter — to recognized volunteer with role description*

**While not part of the Constructive Coaching process, this template is included as a reference.*

(Delete this letter heading and localize by printing on MU Extension letterhead)

[Date]

[Name
Address
City, State ZIP]

Dear (Mr./Mrs./Ms. Last Name):

We are pleased to welcome you as a University of Missouri Extension volunteer in [Name of County] County. We feel that you will be a valuable addition to our MU Extension program.

As an MU Extension [Name of Program] volunteer, you will be expected to: [Include information here about specific volunteer roles or mention, and attach a volunteer role description.]

- .
- .
- .

You are now an officially recognized MU Extension volunteer. As a new volunteer, you need to participate in an orientation and/or training for the [Name of Program] program. This training is designed to help you better understand your specific role as a [Name of Program] volunteer and to provide you with the knowledge and skills necessary to excel in your role.

[Provide details about the training, the contact information or website URL for the applicant to access the training.]

You are also welcome to check out resources and materials (e.g., program curricula) from your local MU Extension office at any time. Our address is listed at the top of this letter.

Sincerely,

[Faculty/Staff First and Last Name]
[Title]

Enclosure: Volunteer Role Description

#2 Referred Volunteer Applicant Letter Template

**While not part of the Constructive Coaching process, this template is included as a reference.*

(Delete this letter heading, localize by printing on MU Extension letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name
Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

You recently submitted a Volunteer Applicant Background Check Consent form as part of University of Missouri Extension's volunteer screening and selection process.

This screening produced a confidential report from Family Care Safety Registry (FCSR), Missouri Department of Social Services. Because of the results of the screening, your application was referred back to our County Volunteer Personnel Committee (VPC) for confidential review and action.

If you believe the report is an error, please contact FCSR at 866-422-6872 to seek resolution. Upon a favorable resolution, please contact the extension office to continue with the volunteer screening and selection process.

If the matter is not resolved, please notify me in writing if you want your application to be reconsidered by the local VPC. Once your written request is received, I will set a meeting date with you and the committee. You have the right to submit materials to the meeting up to one week before the meeting takes place.

The VPC will review your confidential application materials, gather additional information, and determine whether you should be approved as an MU Extension [Name of Program] volunteer for the current program year.

Another option is for you to withdraw your volunteer application. If I do not hear from you by [date], I will assume that you are withdrawing your application and no further action will be taken.

Sincerely,

[Faculty/Staff First and Last Name]
[Title]

#3 Denied Volunteer Applicant Letter Template
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

After considering your application and the additional information you have provided, your request to become a University of Missouri Extension [Name of Program] volunteer has been denied for the current program year.

The MU Extension [Name of Program] appreciates and recognizes the contributions of volunteers. Occasionally, there are times when difficult, confidential personnel decisions have to be made in the interest of providing a high-quality learning environment for all. Thanks for understanding our policy of keeping staff and/or volunteer personnel matters confidential.

Feel free to contact me if you would like further details. Thank you for your interest in MU Extension [Name of Program] [or] If you wish additional information on this decision, please send me a written request for an appeal meeting within 15 days from the date on this letter.

Sincerely,

[Staff First and Last Name]
[Title]

Pc: [First and Last Name] Community Engagement Specialist [if different from above]
[First and Last Name], Regional Director
[First and Last Name], Director of Risk & Volunteer Management, MU Extension
[First and Last Name], [Name of Program] Director

#4 Letter Confirming Agreed-Upon Meeting with Volunteer
Include a copy of the MU Extension Volunteer Code of Conduct
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

Thank you for agreeing to meet on [date] at [time] at the MU Extension in [Name of County] County office. The purpose of our meeting is to review policies governing the University of Missouri Extension [Name of Program] program, as well as to answer your questions. Additionally, we have the option to plan goals and strategies to grow your skills as an MU Extension volunteer, as well as ensure compliance with the MU Extension Volunteer Code of Conduct (enclosed). A productive meeting will affirm your desire to continue as a volunteer for the MU Extension [Name of Program] program in [Name of County].

Meeting Details:

[date]

[time]

MU Extension in [Name of County] County office

[Address]

If you need to request an alternate meeting date or time, please contact me by [date] to make that arrangement at [phone number]

Sincerely,

[Staff First and Last Name]

[Title]

Pc: [First and Last Name], Regional Director

[First and Last Name], Director of Risk & Volunteer Management, MU Extension

Encl. MU Extension Volunteer Code of Conduct

#5 Letter Requesting a Meeting with Volunteer (set by Specialist)
Include a copy of the MU Extension Volunteer Code of Conduct
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

It is necessary for you to meet with me for the purpose of reviewing policies governing the University of Missouri Extension [Name of Program] program. Currently, you are not in compliance with the MU Extension Volunteer Code of Conduct (enclosed), and steps need to be taken by you to continue as a recognized MU Extension [Name of Program] volunteer. At the meeting, we will establish goals and strategies to grow your skills as an MU Extension volunteer, as well as ensure compliance with the [Name of Program]. A productive meeting will affirm your desire to continue as a volunteer for the [Name of Program] program in [Name of County].

Meeting Details:

[date]

[time]

MU Extension in [Name of County] County office

[Address]

If you need to request an alternate meeting date or time, please contact me by [date] to make that arrangement at [phone number]

Sincerely,

[Staff First and Last Name]

[Title]

Pc: [First and Last Name], Regional Director

[First and Last Name], Director of Risk & Volunteer Management, MU Extension

Encl. MU Extension Volunteer Code of Conduct

#7 Receipt of Appeal Meeting Request Letter Template
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date] (NOTE: This should be sent at least 2 weeks prior to the meeting)

[Name Address
City State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

I am writing to confirm that we received your written request for an appeal meeting. Please note that the [pick whichever is appropriate to the program: Volunteer Personnel Committee (VPC); Regional Director; Program Director; Leadership Team] is able to meet with you:

TIME: [xx:xx to xx:xx] (30-minute range)

DATE:

PLACE: MU Extension in [Name of County] County office, [address]

Please note the following agenda.

- Introductions (1 minute)
- Overview of Appeal Process (3 minutes)
- Review Volunteer of Conduct (3 minutes)
- Your time Appeal (15 minutes)
- Review of what happens next (5 minutes)

You are welcome to send any documents in advance for the committee's review, noting that we will accept them up to [date], one week before the appeal meeting takes place. Please note: The appeals meeting is a private meeting between yourself and extension personnel.

After the appeals meeting is adjourned, the VPC will respond in writing with a final decision to your appeal within 10 days from the date of our meeting.

Sincerely,

[Staff First and Last Name]
[Title]

Pc: [First and Last Name] Community Engagement Specialist [if different from above]
[First and Last Name], Regional Director
[First and Last Name], Director of Risk & Volunteer Management, MU Extension
[First and Last Name], [Name of Program] Director

#8 Volunteer Personnel Committee Decision Letter Template
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

Thank you for your time and information provided during the [date of the] appeal meeting.

I am writing to confirm that the Volunteer Personnel Committee has carefully reviewed information related to your volunteer status and has made a determination to:

[Faculty/staff choose one of the following as appropriate and delete other options]

- o Accept you as an MU Extension [Name of Program] volunteer for this program year, as is
- o Accept you as an MU Extension [Name of Program] volunteer for this program year, with the restriction(s) of: *[FILL IN THIS SECTION IF APPLICABLE OR DELETE BEFORE PRINTING]*
- o Decline your MU Extension [Name of Program] volunteer application for this program year.
- o [fill in the blank]

The MU Extension [Name of Program] appreciates and recognizes the contributions of volunteers. Occasionally, there are times when difficult, confidential personnel decisions have to be made in the interest of providing a high-quality learning environment for all. Thanks for understanding our policy of keeping staff and/or volunteer personnel matters confidential.

Please let me know if you have any questions.

Sincerely,

[Staff First and Last Name]
[Title]

Pc: [First and Last Name] Community Engagement Specialist [if different from above]
[First and Last Name], Regional Director
[First and Last Name], Director of Risk & Volunteer Management, MU Extension
[First and Last Name], [Name of Program] Director

#9 MU Extension volunteer performance improvement planning guide

CONFIDENTIAL

Directions: The MU Extension [Name of Program] in [County Name] supervisor and the volunteer should work together in developing and carrying out a 30- to 60-day improvement plan.

1. Overall expectation(s) based on MU Extension Volunteer Code of Conduct

2. Volunteer's specific goal(s):

3. Volunteer's requested support and/or resources. Examples:
 - a. Conversations with:
 - b. Mentoring by:
 - c. Training in:
 - d. Resources:

4. Volunteer supervisor's suggested support, resources and/or activities. Examples:
 - a. Conversations with:
 - b. Mentoring by:
 - c. Training in:

 - d. Resources

We agree to improve the MU Extension [Name of Program] program in our county by working together in the next [circle one] 30 days or 60 days to carry out the VPIP listed above. We agree to have a follow-up meeting on: [date and time] at the MU Extension Office in [County Name] County to talk about progress and any additional needs, if applicable.

(Volunteer signature & date)

(Program supervisor signature & date)

Pc: Confidential Volunteer File

[First and Last Name], Regional Director

[First and Last Name], Director of Risk & Volunteer Management, MU Extension

Sample MU Extension volunteer performance improvement planning guide

CONFIDENTIAL

Directions: The MU Extension [Name of Program] in [County Name] supervisor and the volunteer should work together in developing and carrying out a 30- to 60-day improvement plan.

1. Overall expectation(s) based on MU Extension Volunteer Code of Conduct
Actively promote a safe environment for participants, volunteers, visitors, staff and others involved in the program
2. Volunteer's specific goal(s):
Prepare agenda and materials so that youth officers may lead the club meeting.
Welcome and provide information to new families visiting the club meeting.
3. Volunteer's requested support and/or resources. Examples:
 - a. Conversations with: *Other club leaders*
 - b. Mentoring by:
 - c. Training in: *preparing agendas for youth to understand. How to teach parliamentary procedure.*
 - d. Resources:
4. Volunteer supervisor's suggested support, resources and/or activities. Examples:
 - a. Conversations with: *Other club leaders, 4-H club officers*
 - b. Mentoring by: *Jane Smith, club leader of the Lucky Charms 4-H Club.*
 - c. Training in: *MU Extension 4-H club management*
 - d. Resources: *4-H Quality Matters Toolkit*

We agree to improve the MU Extension [Name of Program] program in our county by working together in the next [circle one] 30 days or 60 days to carry out the VPIP listed above. We agree to have a follow-up meeting on: [date and time] at the MU Extension Office in [County Name] County to talk about progress and any additional needs, if applicable.

(Volunteer signature & date)

(Program supervisor signature & date)

Pc: Confidential Volunteer File

[First and Last Name], Regional Director

[First and Last Name], Director of Risk & Volunteer Management, MU Extension

#10 Volunteer Performance Improvement Confirmation Letter Template
For use when the volunteer and specialist developed the VPIP together.
(Delete this letter heading, localize by printing on letterhead.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

Thank you for meeting with me on [date of meeting]. I am pleased we were able to put together a Volunteer Performance Improvement Plan (VPIP) designed to improve the MU Extension [Name of Program] experience in [Name of County] County and your success as an MU Extension volunteer. The purpose of the meeting will be to review your progress towards the goals we established. By achieving the goals and expectations in the VPIP, you are taking action necessary to retain your status as a recognized MU Extension [Name of Program] volunteer.

I look forward to our follow-up meeting on [date of follow-up meeting] at the MU Extension Office in [County Name] County located at [address of county extension office]. Please contact the extension office within 10 days of the date of this letter to confirm the meeting date and time or to request an alternative meeting time and date. Please note rescheduling the meeting may not be an option.

You will receive a confirmation call regarding the VPIP review meeting within 2 weeks of the scheduled meeting. Your communication with the MU Extension Office in [County Name] County indicates your intent to continue as a volunteer with the MU Extension [Name of Program] program.

Sincerely,

[Staff First and Last Name]
[Title]

Pc: [First and Last Name] Community Engagement Specialist [if different from above]
[First and Last Name], Regional Director
[First and Last Name], Director of Risk & Volunteer Management, MU Extension

#11 Prescribed Volunteer Performance Improvement Plan Letter Template
For use when the specialist created the VPIP on behalf of a volunteer.
(Delete this letter heading, localize by printing on letterhead.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

As it was not possible to develop a Volunteer Performance Improvement Plan (VPIP) collaboratively, it was necessary that I develop a VPIP on your behalf (enclosed). The purpose of the VPIP is to improve the MU Extension [Name of Program] experiences in [Name of County] County and your ability to be successful as an MU Extension volunteer. By achieving the goals and expectations established in the VPIP, you are taking the action necessary to retain your status as a recognized MU Extension [Name of Program] volunteer.

A follow-up meeting is required in [*select between 30-40*] days from the date of this letter to review your progress toward achieving the goals and expectations. Tentatively, the meeting is set for [date of follow-up meeting you determined] at the MU Extension Office in [County Name] County located at [address of county extension office]. Please contact the extension office within 10 days of the date of this letter to confirm the meeting date and time or to request an alternative meeting time and date. Please note rescheduling the meeting may not be an option.

You will receive a confirmation call regarding the VPIP review meeting within 2 weeks of the scheduled meeting. Your communication with the MU Extension Office in [County Name] County indicates your intent to continue as a volunteer with the MU Extension [Name of Program] program.

Sincerely,

[Staff First and Last Name]
[Title]

Pc: [First and Last Name] Community Engagement Specialist [if different from above]
[First and Last Name], Regional Director
[First and Last Name], Director of Risk & Volunteer Management, MU Extension

#12 Post-Meeting/Post-VPIP Planning: Dismissal Letter for an Active Volunteer
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

Thank you for meeting on *[date of meeting]* with *[names of each MU Extension faculty/staff present]* to discuss your status as a University of Missouri Extension [Name of Program] volunteer. This letter is to inform you that you are dismissed from the MU Extension [Name of Program] program effective immediately. You no longer have the rights and privileges to represent yourself as a recognized MU Extension volunteer.

After the *[date of meeting]* meeting, an MU Extension Volunteer Personnel Committee (VPC), including myself and other MU Extension personnel, met to determine the next course of action. The decision was made by the VPC to revoke your MU Extension volunteer status. Determining factors leading to the decision include:

[Eliminate the items that do not apply or add other items.]

- Not achieving the goals and expectations set in the Volunteer Improvement Performance Plan (VPIP)
- Serious infractions of the policies and philosophies of the MU Extension [Name of Program] program
- Failure to return *[equipment, checkbook/credit card, supplies, keys, fill in the blank]* to the MU Extension in *[Name of County]* office by the date previously established.
- Failure to turn in *[bank statements, curriculum, minutes, fill in the blank]* to the MU Extension in *[Name of County]* office by the date previously established.

The MU Extension [Name of Program] appreciates and recognizes the contributions of volunteers. Occasionally, there are times when difficult, confidential personnel decisions have to be made in the interest of providing a high-quality learning environment for all. Thanks for understanding our policy of keeping staff and/or volunteer personnel matters confidential.

If you wish additional information on this decision, please send me a written request for an appeal meeting within 15 days from the date on this letter.

Sincerely,

[Staff First and Last Name]
[Title]

Pc: MU Extension Volunteer Personnel Committee

[First and Last Name] Community Engagement Specialist [if applicable and if different from above,
or]

[First and Last Name], Regional Director

[and First and Last Name], Director of Risk & Volunteer Management, MU Extension

#13 Post-Meeting/Post VPIP Review: Reinstatement Letter for an Active Volunteer
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

Thank you for meeting with [names of all MU Extension personnel attending the meeting] and myself on [date of meeting] for the purpose of reviewing your progress towards achieving the goals and expectations set forth in the Volunteer Performance Improvement Plan (VPIP).

With the progress you have shown, you have retained your status as a recognized MU Extension [Name of Program] volunteer on a probationary status for no more than 12 months. The probationary period will expire without further incident on [date up to one-year from the VPIP meeting].

This information will remain confidential. The probationary status does not affect your ability to represent the MU Extension [Name of Program] program in [Name of County] in an authorized capacity, nor does it detract from your years of service as a recognized volunteer with MU Extension. Your efforts confirm your dedication to the MU Extension [Name of Program] program and the policies that govern it. Thank you.

If you wish additional information on this decision, please send me a written request for an appeal meeting within 15 days from the date on this letter.

Sincerely,

[Staff First and Last Name]
[Title]

Pc: [First and Last Name] Community Engagement Specialist [if different from above]
[First and Last Name], Regional Director
[First and Last Name], Director of Risk & Volunteer Management, MU Extension

#14 Pending Dismissal: Request of Final Meeting — Level 3

Include a copy of the MU Extension Volunteer Code of Conduct

(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

This letter is to inform you of your dismissal from the University of Missouri Extension [Name of Program] program. You are entitled to meet with extension personnel and me to review the reasons of your dismissal. The policies governing the MU Extension [Name of Program] program including the MU Extension Volunteer Code of Conduct (enclosed) ensure that all MU Extension programs are open and accessible to all.

Options for the meeting:

[date]	[date]
[time]	[time]
MU Extension in [County Name] County office [Address]	MU Extension in [County Name] County office [Address]

Please confirm your intent to attend one of the listed dates within 10 days of the date of this letter. If you need to request an alternate meeting date or time, please contact me by [date] to make that arrangement at [phone number].

Sincerely,

[Staff First and Last Name]
[Title]

Pc: [First and Last Name], Regional Director
[First and Last Name], Director of Risk & Volunteer Management, MU Extension
[First and Last Name], [Name of Program] Director

Encl. MU Extension Volunteer Code of Conduct

#15 Letter of Immediate Termination for an Active Volunteer — Right of Appeal
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

As I was not permitted to schedule a face-to-face meeting with you, and since you have not shown evidence that you have [come back to compliance with the MU Extension Volunteer Code of Conduct; brought the extension financials into compliance by ____; fill in the blank] as requested, MU Extension in [Name of County] county has revoked your MU Extension volunteer status. This termination goes into effect immediately. You no longer have the rights and privileges to represent yourself as a recognized MU Extension [Name of Program] volunteer.

The MU Extension [Name of Program] appreciates and recognizes the contributions of volunteers. Occasionally, there are times when difficult, confidential personnel decisions have to be made in the interest of providing a high-quality learning environment for all. Thanks for understanding our policy of keeping staff and/or volunteer personnel matters confidential.

If you wish additional information on this decision, please send me a written request for an appeal meeting within 15 days from the date on this letter.

Sincerely,

[Staff First and Last Name]
[Title]

Pc: [First and Last Name] Community Engagement Specialist [if different from above]
[First and Last Name], Regional Director
[First and Last Name], Director of Risk & Volunteer Management, MU Extension

#16 Letter of Immediate Termination for an Active Volunteer — No Right of Appeal
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

As you have demonstrated [pick one: no intention of meeting with University of Missouri Extension personnel to review MU Extension policies; an unwillingness to abide by the MU Extension Volunteer Code of Conduct; fill in the blank], MU Extension in [Name of County] County has revoked your MU Extension volunteer status. This termination goes into effect immediately. You no longer have the rights and privileges to represent yourself as a recognized MU Extension [Name of Program] volunteer.

The MU Extension [Name of Program] appreciates and recognizes the contributions of volunteers. Occasionally, there are times when difficult, confidential personnel decisions have to be made in the interest of providing a high-quality learning environment for all. Thanks for understanding our policy of keeping staff and/or volunteer personnel matters confidential.

Sincerely,

[First and Last Name]
Director of Risk & Volunteer Management, MU Extension

[County Specialist/Staff Name]
[Title]

Pc: [First and Last Name] Community Engagement Specialist [if different from above]
[First and Last Name], Regional Director

#17 Letter of Immediate Termination — Severe Infraction of Code of Conduct
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

Effective immediately, MU Extension in [Name of County] County has revoked your MU Extension volunteer status. This termination goes into effect immediately. You no longer have the rights and privileges to represent yourself as a recognized MU Extension volunteer.

MU Extension must make difficult, confidential personnel decisions in the interest of providing a high-quality educational environment for all. Thanks for understanding our policy of keeping staff and/or volunteer personnel matters confidential.

Sincerely,

[First and Last Name]
Director of Risk & Volunteer Management, MU Extension

[County Specialist/Staff Name]
[Title]

Pc: [First and Last Name] Community Engagement Specialist [if different from above]
[First and Last Name], Regional Director

#18 Positive Conclusion of Constructive Coaching
Allegation Proved False or Resolved Without Further Incident.
(Delete this letter heading, localize by printing on letterhead and send via certified mail.)

CONFIDENTIAL

[Date]

[Name Address
City, State ZIP]

Dear [Mr./Mrs./Ms. Last Name]:

Thank you for [meeting/talking] with me on [date] to talk about [fill in the blank]. From our conversation [optional: pending no further incident], I consider the matter settled, and this will not affect your status as a recognized University of Missouri Extension [Name of Program] volunteer.

Please understand, with the high regard our community places on MU Extension programs, it is important to follow up on all matters brought to our attention, even those with a quick and easy resolution. This information will remain confidential. You may continue to represent the MU Extension [Name of Program] program in [Name of County] in an authorized capacity. Thank you.

Sincerely,

[Staff First and Last Name]
[Title]

Pc: [First and Last Name] Community Engagement Specialist [if different from above]
[First and Last Name], Regional Director
[First and Last Name], Director of Risk & Volunteer Management, MU Extension

APPENDIX F

University of Missouri Extension Volunteer Code of Conduct

Volunteers are key MU Extension partners, helping guide and deliver programs that matter to Missourians. Extension expects and depends on 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 coaching, possible removal from the volunteer role or legal liability. (Collected Rules and 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 and 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 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 all laws, regulations, and MU Extension policy concerning fiscal responsibility and property rights.
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 supervised event. Avoid unlawful possession, use and/or distribution of alcohol at any extension sponsored or 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. Failure to uphold any of the code of conduct standards listed may result in coaching by an assigned MU Extension program adviser. This may include reassignment, role restriction and, if appropriate, removal from all MU Extension volunteer roles.

Volunteer Signature

Date

Phone Number

Program

Supervisor Signature

Date

Title

Acknowledgements

This resource is intended to meet the changing needs of the organization and MU Extension volunteers as a way to assist the advising specialist with volunteer management efforts. University of Missouri Extension and the Director of Risk & Volunteer Management, MU Extension thank the following MU Extension personnel for their contributions to this guide: Katherine Foran and Joe Vale, Communications and Marketing; Velynda Cameron, CES 4-H Youth Development, Polk County; Katie Hogan, CES 4-H Youth Development, Clark County; Debi Kelly, Field Specialist in Horticulture, Jefferson County.

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