

## **Volunteer Management Policies**

### **The Volunteer Program of the City of Sierra Madre**

#### **1.01 Overall Policy on Utilization of Volunteers**

The achievement of the goals of the City of Sierra Madre (City) can be served in part by the active participation of citizens of the community. The Sierra Madre residents' participation as volunteers within the City government helps create a sense of belonging to the City, and establish a strong rapport between the residents and the City government. This also provides an opportunity for residents to serve their community. To this end, the City accepts and encourages the involvement of volunteers at various levels of the City within appropriate programs and activities. Volunteers are recruited without regard to residence, gender, handicap, age, race or other condition. All employees are encouraged to assist in the creation of meaningful and productive roles in which volunteers might serve and to assist in recruitment of volunteers from the community.

#### **1.02 Definition of 'Volunteer'**

A 'volunteer' is anyone who without expectation of compensation beyond reimbursement, performs a task at the direction of and on behalf of the City. Any and all services provided to the City are donated to the City without contemplation of compensation or future employment, and are given for charitable reasons. A 'volunteer' must be officially accepted and enrolled by the City prior to performance of any task. **Nothing in this policy shall be deemed to create a contract between the volunteer and the City of Sierra Madre ("City"). The volunteer shall not be considered an employee at any time.** Both the volunteer and the City have the right to terminate the volunteer's service to the City at any time, for any reason, with or without cause and without right to appeal.

#### **1.03 Personnel Rules & Regulations**

All volunteers are subject to the applicable sections of the City of Sierra Madre Personnel Rules & Regulations. Personnel Rules and Regulations regarding employee benefits do not apply to volunteers..

#### **1.04 Purpose of Volunteer Policies**

The purpose of these policies is to provide rules specific to volunteers in addition to the Personnel Rules & Regulations that are applicable to volunteers and provide overall guidance and direction to employees and volunteers as pertains to the City's Volunteer Program. These policies are intended for internal management guidance only, and do not constitute, either implicitly or explicitly, a binding contractual or personnel agreement. The City reserves the exclusive right to change any of these policies at any time and to

expect adherence to the changed policy. Changes to or exceptions from these policies may only be granted by the City Manager, and must be obtained in advance and in writing. Areas not specifically covered by these policies shall be determined by the City Manager.

### **1.05 Role of the Secretary of Service and Volunteering**

The productive utilization of volunteers requires a planned and organized effort. The Secretary of Service and Volunteering provides a central coordinating point for effective volunteer management within the City. The Secretary of Service and Volunteering shall serve as a liaison to other volunteer-utilizing programs in the community and assist in community-wide efforts to recognize and promote volunteering. The Secretary of Service and Volunteering is responsible for effective volunteer utilization, for assisting employees in identifying productive and creative volunteer roles, for recruiting suitable volunteers, and for tracking and evaluating the contribution of volunteers to the City.

### **1.06 Special Case Volunteers**

The City accepts as volunteers those participating in student community service activities, student intern projects, alternative sentencing or diversion programs, corporate volunteer programs, and other volunteer referral programs. In each of these cases, however, a special agreement must be in effect with the organization, school, or program from which the special case volunteers originate and must identify responsibility for management and care of the volunteers.

### **1.07 Employees as Volunteers**

The City accepts the services of employees as volunteers. This service is accepted provided that the volunteer service is provided totally without any coercive nature, involves work which is outside the scope of the employee's normal duties, and is provided outside of usual working hours. Family members of employees are allowed to volunteer with the City. When family members are enrolled as volunteers, they will not be placed under the direct supervision or within the same department as other members of their family who are employees. An exception for family participation in episodic volunteer work may be granted by the City Manager.

### **1.08 Service at the Discretion of the City**

The City accepts the service of all volunteers with the understanding that such service is at the sole discretion of the City, and service may be terminated at any time for any

reason with or without cause and without the right to appeal. Prior to dismissal of a volunteer, staff should seek the consultation and assistance of the Secretary of Service and Volunteering.

### **1.09 Scope of Volunteer Involvement**

Volunteers may be utilized in any programs and activities of the City that the City deems useful, and serve at various levels of skill and decision-making. Volunteers shall not be utilized to displace any paid employees from their positions.

## **Volunteer Management Procedures**

### **2.01 Maintenance of Records**

A system of records will be maintained on each volunteer with the City, including dates of service, positions held, and duties performed.. Volunteers and appropriate employees shall be responsible for submitting appropriate records and information to the Community & Personnel Services Department in a timely and accurate fashion.

### **2.02 Conflict of Interest**

Volunteers are to refrain from participating in any activity or program of the City where there is a real or perceived conflict of interest. Volunteers shall discuss possible conflicts with their supervisor.

### **2.03 Representation of the City**

Volunteers may not take any action or make any statement which might significantly affect or obligate the City.. These actions may include, but are not limited to, public statements to the press, coalition or lobbying efforts with other organizations, or any agreements involving contractual or other financial obligations. Volunteers are only authorized to act as representatives of the City as specifically indicated within the course and scope of their volunteer position.

### **2.04 Confidentiality**

Volunteers are responsible for maintaining the confidentiality of all privileged information to which they are exposed while serving as a volunteer, whether this

information involves a single employee, volunteer, or other person or involves overall City business.

## **2.05 Dress Code**

As representatives of the City, volunteers , are responsible for presenting a good image to the community. Volunteers shall dress appropriately for the conditions and performance of their duties by following the City's dress code policy in the Personnel Rules & Regulations.

## **2.06 Volunteer Hours**

The City of Sierra Madre must keep track of the hours the volunteer works to assure coverage under the City's self-insured liability and worker's compensation programs. Time records are used to determine how service levels have increased and which services have been enhanced by volunteers. Timesheets are to be filled out each time a volunteer works, at the end of the month, or whenever stipulated by the supervisor. Each volunteer is asked to follow this practice. Volunteers might also want to maintain this record to document their experience and commitment.

## **2.07 Alcohol and Drugs**

Volunteers are subject to the City's Drug and Alcohol Policy as stated in the Personnel Rules & Regulations. Volunteers shall not consume or possess alcoholic beverages nor use, bring, possess or be under the influence of any form of narcotic, drug, or hallucinogen, except prescribed drugs and under the direction of a physician while conducting any City business or on any City premises.

## **2.08 Software Piracy**

The City complies with all copyright laws for software programs installed and used on City owned computers. Volunteers are expected to adhere to the City's Electronic Use Policy in the Personnel Rules & Regulations, which includes prohibiting the use of unauthorized copies of software on City computers; prohibiting the installation of software on City computers that was not purchased through appropriate City policies; and understanding that all computers, software and computer information is City property. Therefore, volunteers who use City computers cannot assume any right to privacy in such use.

## **2.09 Harassment**

Volunteers are subject to the City's Harassment Prevention Policy as stated in the Personnel Rules & Regulations. All City employees and volunteers have a right to work in an environment free from all forms of discrimination and conduct which can be considered harassing, coercive or disruptive. Consistent with the City's respect for the rights and dignity of each employee and volunteer, harassment based on race, color, religion, sex, national origin, age, disability, sexual orientation or any characteristic protected by law, will not be sanctioned or tolerated.

## **2.10 Indemnity**

The volunteer recognizes and acknowledges that there are certain risks of physical injury to volunteers providing voluntary services and agrees to assume the full risk of any injuries, death, damages, or loss, regardless of severity that may arise during the performance of voluntary services for the City.

The volunteer will indemnify, hold harmless, and release the City, its officers, employees, agents and volunteers from and against any and all claims, damages, lawsuits, costs, expenses and other liabilities caused in part or in whole by volunteer while providing voluntary services for the City, including injury to their person, damage to their property, and injury or damage to the person and/or property of other volunteers or members of the public.

## **Volunteer Recruitment and Selection**

### **3.01 Job Descriptions**

Prior to any volunteer assignment or recruitment effort, a supervisor of a volunteer may develop a description of the volunteer's position. This description may include a description of the purpose and duties of the position, a designated supervisor and worksite, and a listing of qualifications needed for the position..

### **3.02 Employee Requests for Volunteers**

Requests for volunteers shall be submitted by interested employees with a draft volunteer position description and a requested timeframe.

### **3.03 Recruitment of Minors**

Volunteers under the age of 18 must have the written consent of a parent or guardian prior to volunteering.

### **3.04 Interviewing**

Prior to being assigned or appointed to a position, the City may interview the prospective volunteer to ascertain their suitability for the position, the qualifications of the volunteer, their commitment to fulfill the requirements of the position, and interest in that position.

### **3.05 Health Screening**

In cases where volunteers will be working with residents with health difficulties, a health screening procedure may be required prior to volunteer assignment. In addition, if there are physical requirements necessary for performance of a volunteer task, a screening or testing procedure may be required to ascertain the ability of the volunteer to safely perform the task.

### **3.06 Criminal Records Check**

As appropriate for the protection of the City and people the volunteer may come in contact with, such as children, and when a volunteer position requires handling of cash or billing, volunteers will be asked to submit to a background criminal check..

### **3.07 Certificate of Ability**

Any potential volunteer who indicates that they are under the care of a physician for either physical or psychological treatment may be asked to present a Fit for Duty certificate from the physician as to their ability to satisfactorily and safely perform their volunteer duties. Volunteers under a course of treatment which might affect their volunteer work will not be accepted without written verification of suitability from their physician.

Any volunteer who, after acceptance and assignment by the City, enters a course of treatment which might adversely impact upon the performance of their volunteer duties must consult with the Community & Personnel Services Department

### **3.08 Placement**

No placement shall be made unless the requirements of both the volunteer and the supervising employee can be met. .

### **3.09 Employee Approval**

Assignment of a potential volunteer will not take place without review and approval of appropriate employee and department head with whom the volunteer will be working.

### **3.10 Acceptance and Appointment**

Service as a volunteer with the City shall begin with a notice of acceptance or appointment to a volunteer position. Notice may only be given through the Community & Personnel Services Department. No volunteer shall begin performance of any position until they have been officially accepted for that position and have completed necessary screening and paperwork. At the time of final acceptance, each volunteer shall complete necessary enrollment paperwork and shall receive a copy of their agreement of service with the City.

### **3.11 Professional Services**

Volunteers shall not perform professional services for which certification or licensing is required unless currently certified or licensed to do so. A copy of such certificate or license must be provided to the Community & Personnel Services Department.

## **Volunteer Training and Development**

### **4.01 Orientation**

All volunteers will receive a general orientation on the nature and purpose of the City, an orientation on the nature and operation of the program or activity for which they are recruited, and a specific orientation on the purposes and requirements of the position which they are accepting in that effort. Volunteers may receive specific on-the-job training as the City deems necessary.

#### **4.02 Employee Involvement in Orientation and Training**

The Secretary of Services and Volunteering will have an active role in the design and delivery of both orientation and training of volunteers. Those employees in a supervisory capacity to volunteers shall have primary responsibility for design and delivery of on-the-job training to volunteers assigned to them, if such training is deemed necessary

#### **4.03 Volunteer Involvement in Orientation and Training**

Experienced volunteers should be included in the design and delivery of volunteer orientation and training.

#### **4.04 Continuing Education**

Volunteers should attempt to improve their levels of skill during their terms of service. Additional training and educational opportunities may be made available to volunteers during their connection with the City. This continuing education may include both additional information on performance of their current volunteer assignment as well as more general information, and might be provided either by the City or by assisting the volunteer to participate in educational programs provided by other groups.

#### **4.05 Conference Attendance**

Volunteers are encouraged to attend conferences and meetings which are relevant to their volunteer assignments, including both those of the City and of other organizations. Prior approval from the volunteer's supervisor shall be obtained before attending any conference or meeting if reimbursement of expenses is sought.

### **Volunteer Supervision and Evaluation**

#### **5.01 Requirement of a Supervisor**

Each volunteer who is accepted to a position with the City should have a clearly identified supervisor, approved by the appropriate department head, who is responsible for direct management of that volunteer. This supervisor shall be responsible for day-to-

day management and guidance of the work of the volunteer, and shall be available to the volunteer for consultation and assistance.

### **5.02 Volunteers as Volunteer Supervisors**

A volunteer may act as a supervisor of other volunteers, provided that the supervising volunteer is under the direct supervision of a paid staff member.

### **5.03 Acceptance of Volunteers by Employees**

Since individual employees are in a better position to determine the requirements of their work and their own abilities, no volunteer will be assigned to work with an employee without the consent of that employee. Employees are encouraged to consider creative ways in which volunteers might be of service and to consult with the Secretary of Service and Volunteering if they feel in need of assistance in this regard.

### **5.04 Employee Volunteer Management Training**

An orientation on working with volunteers may be provided to employees. In-service training on effective volunteer utilization may be provided to those employees who are highly involved in volunteer management.

### **5.05 Volunteer Evaluation of Volunteer Program**

Volunteers will periodically be asked to evaluate their experience volunteering for the City of Sierra Madre. This evaluation will include aspects ranging from work assignments, supervision, organization, and overall program satisfaction.

### **5.06 Evaluations**

Volunteers may receive periodic evaluations to review their work. Such evaluation may be utilized to review the performance of the volunteer, to suggest any changes in work style, to seek suggestions from the volunteer on means of enhancing the volunteer's relationship with the City, to convey appreciation to the volunteer, and to ascertain the continued interest of the volunteer in serving in that position. This evaluation session is an opportunity for both the volunteer and the City to examine and improve their relationship.

### **5.07 Results of Evaluation**

An evaluation may uncover inadequate training, a misunderstanding of policies, or indicate there may be a better fit for the volunteer in a different position. In such cases additional training may be supplied, the volunteer may be re-assigned to a new position, or the volunteer may be dismissed from volunteer service.

### **5.08 Employee Involvement in Volunteer Evaluation**

If a Department chooses to conduct an evaluation of the volunteer, supervising employees will have input into the evaluation of the work assignments of volunteers with whom they supervise. The results of the evaluation will be supplied to the Secretary of Service and Volunteering.

### **5.09 Lines of Communication**

Effective use of volunteers includes access to all necessary information pertinent to the performance of their work assignments. Such access shall be granted at the Department's discretion. Primary responsibility for ensuring that the volunteer receives such information will rest with the direct supervisor of the volunteer. Lines of communication should operate in both directions, and should exist both formally and informally.

### **5.10 Absenteeism**

Volunteers are expected to perform their duties on a regular scheduled and timely basis. If expecting to be absent from a scheduled duty, volunteers shall inform their supervisor as far in advance as possible so that alternative arrangements may be made.

### **5.11 Substitution**

Volunteers may be encouraged to find a substitute for any upcoming absences which might be filled by another City volunteer. Such substitution shall only be taken following consultation with a supervisor and care should be taken to find a substitute who is qualified for the position. Volunteers are encouraged to recruit others to become City volunteers to help fill such needs.

### **5.12 Standards of Performance**

Standards of performance shall be established for each volunteer position. These standards should list the work to be done in that position, measurable indicators of whether the work was accomplished, and appropriate timelines for accomplishment of the work. Creation of these standards will be a joint function of the employee and the volunteer assigned to the position, and a copy of the standards should be included in the job description at the beginning of their assignment.

### **5.13 Volunteer Concerns and Grievances**

If a volunteer has problems with their job, supervision, or any issues that are not satisfactorily addressed, the volunteer should consult the Secretary of Service and Volunteering. If not resolved, the Secretary of Service and Volunteering may then consult with the Director of Community & Personnel Services on the proper grievance procedure. Volunteers are not subject to grievance procedures described in the City's Personnel Rules and Regulations.

### **5.14 Notice of Departure or Re-Assignment of a Volunteer**

In the event that a volunteer departs the City, whether voluntarily or involuntarily, or is re-assigned to a new position, it shall be the responsibility of the Secretary of Service and Volunteering to inform those affected employees that the volunteer is no longer assigned to work with them. In cases of dismissal for cause, this notification should be given in writing and should clearly indicate that any further contact with the volunteer is outside any scope of relationship with the City.

### **5.15 Resignation**

Volunteers may resign from their volunteer service with the City at any time. It is requested that volunteers who intend to resign provide advance notice of their departure and a reason for their decision.

## **5.16 Exit Interviews**

The Secretary of Service and Volunteering may conduct an exit interview with volunteers who are leaving their positions. The interview should ascertain why the volunteer is leaving the position, suggestions the volunteer may have to improving the position, and the possibility of involving the volunteer in some other capacity with the City.

## **5.17 Communication with the Secretary of Service and Volunteering**

The Secretary of Service and Volunteering is responsible for maintaining regular communication with the employees supervising volunteers on the status of volunteers, and is responsible for assisting staff in the timely provision of all necessary paperwork to the Community & Personnel Services Department. The Secretary of Service and Volunteering should be informed of any substantial change in the work or status of a volunteer.

## **Volunteer Support and Recognition**

### **6.01 Reimbursement of Expenses**

Volunteers may be eligible for reimbursement of reasonable expenses incurred while undertaking business for the City. The Secretary of Service and Volunteering shall distribute information to all volunteers regarding specific reimbursable items. Prior approval must be sought from their supervisor for any expenditure.

### **6.02 Access to City Property and Materials**

As appropriate, volunteers may have access to City property and materials necessary to fulfill their duties, and shall receive training in the operation of any equipment. Property and materials shall be utilized only when directly required for City purposes. This policy does not include access to and use of City vehicles.

### **6.03 Insurance**

Liability insurance and worker's compensation are provided for all volunteers engaged in City business. Volunteers are covered by the City's general liability policy so long as they are acting within the scope and course of their assigned duties.

Automobile insurance follows the automobile. If driving a City vehicle, City insurance will be in effect. Likewise, if a volunteer is driving their own vehicle, even while on City business, their automobile insurance will be applicable on a primary basis per the California Insurance Code, section 11580.9.

The City will conduct a motor vehicle driving record check for all volunteers who drive as part of their volunteer position, so the volunteer is to provide proof of insurance and a copy of his/her driver's license to the Community & Personnel Services Department as applicable. The volunteer will also be responsible for following the procedures of the Vehicle Policy in the Personnel Rules & Regulations.

#### **6.04 Recognition**

An annual volunteer recognition event will be conducted to highlight and reward the contribution of volunteers to the City. Volunteers may be consulted and involved in order to develop an appropriate format for the event.

#### **6.05 Informal Recognition**

All employees and volunteers responsible for volunteer supervision are encouraged to undertake on-going methods of recognition of volunteer service on a regular basis throughout the year. These methods of informal recognition may range from simple "Thank You's" to a concerted effort to include volunteers as full participants in program decision making and implementation.

#### **6.06 Volunteer Career Paths**

Volunteers are encouraged to grow and develop their skills while serving with the City, and employees are encouraged to assist volunteers through promotion to new volunteer jobs to assume additional and greater responsibilities.

#### **6.07 Employee Recognition**

The Secretary of Service and Volunteering shall design a program for recognition of employees who work well with volunteers and shall consult with volunteers to identify appropriate employees to receive such awards.