



# Volunteer Policies and Procedures

## Effective Program Management for Senior Corps

Facilitator: Claudia Birmingham, JBS International | January 21, 2016 | 3:00 to 4:00 PM EST



# Agenda



- Description of policies and procedures
- Policies and procedures for FGP and SCP grantees
- Organizing policies and procedures
- Developing and adapting policies and procedures
- Questions and Answers

# Policies and Procedures for FGP and SCP



## Have you started writing volunteer policies and procedures?

- We haven't started yet.
- We just started working on this
- We are almost done.
- We finished and finalized them.

# Description of Policies and Procedures

- Benefits of well-defined policies and procedures
  - Effective management
  - Clarifies responsibilities and expectations
  - Ensures compliance with laws, regulations, and requirements
  - Better recordkeeping
  - Limit conflict, loss of trust and resources
  - Resource and continuity for future staff



# Description of Policies and Procedures

- Characteristics of well-defined policies and procedures
  - Explains why
  - Clear and consistent language
  - Tasks are spelled out
  - May offer example of how to follow

## Example

**Mileage Reimbursement:** “To help with transportation expenses, volunteers are eligible for reimbursement for travel to and from volunteer stations, as well as travel to program activities including training, recognition events, and in-service meetings. Volunteers who drive their own vehicles will be reimbursed at a rate of \$0.45 per mile not to exceed 30 miles per day. The reimbursement rate and maximum mileage for reimbursement...”

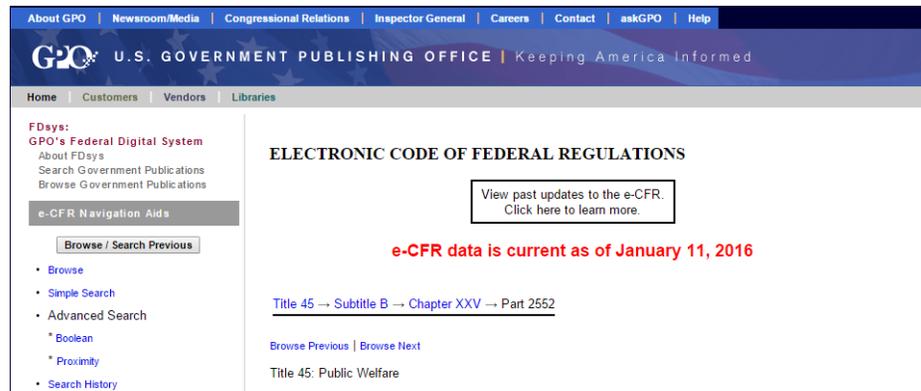
# Description of Policies and Procedures

- Implementing policies and procedures
  - Initiated and monitored by program management
  - Should be visible/accessible
  - Train and review periodically
  - Best practices
    - Calendars, schedules
    - Standardized forms



# Policies and Procedures for FGP and SCP

- Policies are needed to ensure Federal Regulations are followed.



- What do you need to have ready for volunteers?
  - Program policies
  - Screening procedures
  - Volunteer management and support

# Program Policies

- Volunteer Benefits and Policies

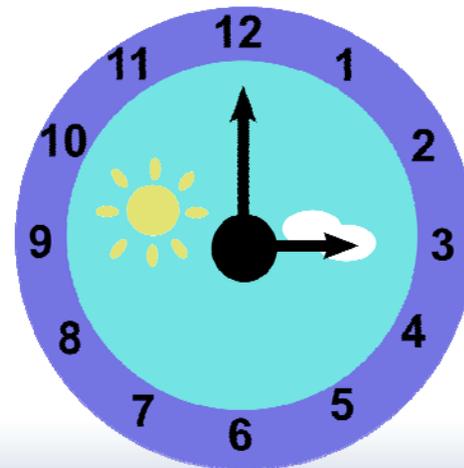
- Stipend
- Transportation
- Meals
- Insurance
- Annual Physical
- Uniforms or Smocks
- Recognition

**Example:** If a volunteer is involved in an accident that involves personal injury or damage to property, they should report the incident to the Volunteer Service Coordinator within 24 hours. The coordinator will interview the volunteer and other participants as necessary, and report the incident to the project director. The project director will...

See FGP and SCP Handbooks at [www.nationalservice.gov](http://www.nationalservice.gov).

# Program Policies

- Terms of service
  - Volunteers must have a service schedule
  - 15-40 hours per week (up to 2088 hours/year)
  - Attendance at trainings is part of service
  - Travel between assignments, meal time with child/client may be part of service
- Service separation
  - Cause for termination
  - Procedures for appeal
  - Prohibited activities



# Policies and Procedures for FGP and SCP



## Where are you with Foster Grandparent or Senior Companion volunteer recruitment?

- We haven't started yet.
- We are just starting to talk to people.
- We have recruited some new volunteers.
- We already have volunteers serving.

# Screening Procedures

## Eligibility

1. Age 55 +
2. Income verification – must not exceed 200% of Federal Poverty Guidelines
  - Annual verification
3. Commitment of 15-40 hours/week
4. Physical exam
  - To make sure they can do the service without harm to themselves or children/elders
  - Annual physical
5. Criminal History Check – NSOPW, FBI, State
  - Accompaniment while waiting for results

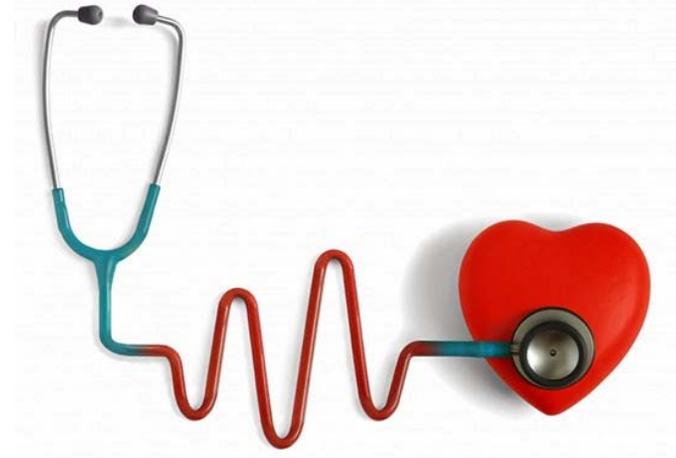
Also see the *Senior Corps Eligibility Requirements Workbook* at [www.nationalservice.gov](http://www.nationalservice.gov).

# Volunteer Management and Support

- Assignment/Care Plans
  - Required for every client/child
  - Specific requirements
- Planning for volunteer orientation and training
  - 20 hours pre-service + 20 hours new volunteer training (may include station orientation)
    - Develop a pre-service plan before you bring on volunteers
  - 4 hours per month in-service training
    - Try to organize an annual plan so it isn't month to month
    - You don't have to do it all!
    - Also helpful for recruitment: 'learn something new' is a reason to volunteer

# Volunteer Management and Support

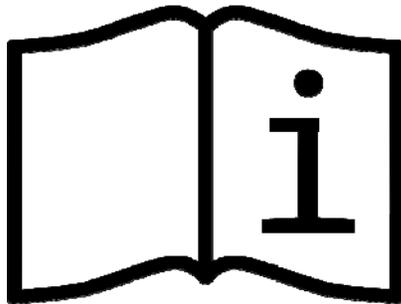
- Time Tracking
  - Track hours, mileage, and meals (if applicable) on one form
  - Program Officers will have a sample
- Annual documentation of:
  - Income eligibility
  - Physical exam
  - Assignment plan
  - Volunteer appraisal



What questions do you have so far?

# Organizing Policies and Procedures

- Volunteer Policy Handbook
  - Serves as your operations manual
  - Written information on policies and procedures for staff, stations, volunteers



## Example of Contents

- I. Purpose and Goals
- II. Eligibility Requirement
- III. Volunteer Role and Assignment
- IV. Terms of Service
- V. Volunteer Training
- VI. Program Benefits
- VII. Program Policies

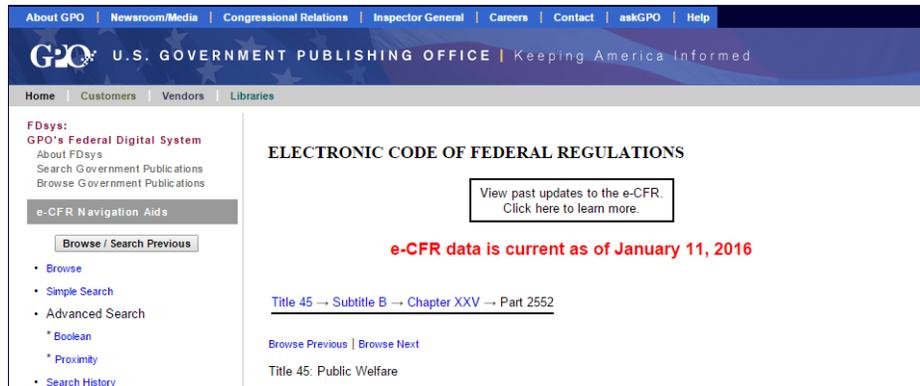
# Organizing Policies and Procedures

- Volunteer File
  - Maintain required documentation on each volunteer
  - Forms from new volunteers (e.g., application)
  - Procedures documented for Criminal History Check
  - Annual updates
  - Volunteer handbook -written information for volunteers re: policies and procedures they need to know



# Developing Policies and Procedures

- Review Federal Regulations



- Review your organization's current policies
  - Examples: Mileage reimbursement, paid leave
  - Allowable within regulations?
  - Adapt current policy (e.g., paid leave for holidays)
  - Keep in mind: grant budget periods and leave carryover

# Developing Policies and Procedures

- Who should be involved?
  - Ask your Program Officer to review policy
  - Tribal Council, Advisory Committee, other stakeholders
- Resources
  - CNCS website
  - Program Officers
  - Other grantees



**Where have you found helpful resources?**

# Q & A



## What questions do you have?

- Checklists
  - Volunteer File Checklist
  - New Volunteer Documentation Checklist\*
  - Volunteer Policy Handbook Checklist\*

\*Please complete and send to your Program Officer, and cc Jill at [JSears@cns.gov](mailto:JSears@cns.gov).