

Volunteer Management

6.1.12

PURPOSE

The purpose of this policy is to recognize the value volunteers contribute to the City of San José by establishing base practices for the management of department volunteer programs to properly coordinate and support volunteers who serve the community.

Volunteer programs are a means to engage residents in improving our community and addressing neighborhood issues. Volunteering builds strong links between the City, the community, and among volunteers and their neighborhoods. The programs should be mutually beneficial, offering job skills, experience, and comradery for volunteers in as much as the City receive the benefits of volunteer time and effort.

POLICY

The City of San José supports the use of volunteers when and where it is feasible and appropriately complements the work of City staff to deliver services to the community. Volunteers are not employees. Either the City or the volunteer can end the service relationship at any time, with or without cause, and with or without notice.

SCOPE OF APPLICATION

This policy applies to all departments utilizing volunteers and to all sites where volunteers are deployed on behalf of the City of San José.

In general, City policies covering broad areas such as Ethical Conduct, Health & Safety, Use of City Equipment & Facilities, Technology, General Procedures, and Transportation & Travel, applies to volunteers. A complete listing of applicable policies will be included in the Volunteer Services Agreement and Volunteer Code of Ethics Agreement. Departments will supplement with additional policies and procedures to address elements relevant to their volunteer program and the clients served.

DEFINITIONS

1. **Volunteer.** An individual freely offering and performing services without receiving financial or compensation from the City.
 - a. **Categories of Volunteers.**
 - i. **Family Volunteers** (any age); Accompanied by parent or guardian and signed consent for involvement.
 - ii. **Youth Volunteers** (Ages 14 – 17); Written consent by parent or guardian will be required.
 - iii. **Adult Volunteers** (Ages 18 and older with no maximum age limit.)
 - b. **Terms of Service.** Time requested by the department for volunteer support of the defined service or project.
 - i. **Short Term** – Volunteer help with a special event or project-based assignment.
 - ii. **Ongoing**– Volunteer providing services for a variety of special events or projects over multiple days or be on-call from a pool of volunteers.

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2. **Social Media.** A platform that allows users to interact and engage with others through the sharing of information, content, and media in a virtual space. It encompasses a wide range of digital technologies and applications such as social networks, blogs, wikis, podcasts, and video sharing websites.
3. **Vulnerable Population Groups.** Vulnerable populations include youth (individuals under 18 years of age) and seniors, or people with disabilities. Volunteer Programs serving these groups may require more extensive volunteer screening, training, background checks, mandatory reporting, and medical clearance to comply with any City, state, and federal laws.
4. **Volunteer Program Coordinator or Liaison.** Departments utilizing volunteers in service to the City must have staff in the role of the defined Volunteer Program Coordinator position or a named Volunteer Program Liaison who performs the management, direction, and monitoring of volunteer programs and projects, as part of their existing job tasks, including selecting, training and supervising the volunteers, and representing the City effectively with volunteers and clients.
5. **Volunteer Program Management Guide.** A document that provides guidance, information, materials, and contacts for managing City volunteer programs, outlining the expectations, responsibilities, and benefits of volunteering, and serves as a reference for volunteers during their involvement with the organization.
6. **Volunteer Supervisor.** City staff member who is trained and then assigned duties to supervise volunteers.

PROCEDURES**I. Administration of Volunteers**

Responsibility for this policy is with individual City departments that utilize volunteers, in consultation with the Human Resources Department and the Office Employee Relations as needed.

Departments operate volunteer programs and projects and therefore must develop and maintain departmental policies consistent with this Citywide Volunteer Policy to achieve departmental goals. Departments with volunteer programs will dedicate the resources to establish and maintain the program in keeping with this Citywide policy, including designating and training their Volunteer Program Coordinator(s) and/or Liaison(s).

In consultation with the Office of Employee Relations, departments can determine tasks and projects that augment department programs for the community, wherein volunteer help does not displace staff work and is in alignment with the department's mission.

II. Screening and Placement

Volunteers may be required to submit to a background check, Live Scan fingerprint check, and health screening for placement in certain assignments. This includes, but is not limited to, assignments at the Library, Police, Transportation, and Parks, Recreation and Neighborhood Services departments. Volunteers who do not consent to screening requirements shall not be able to provide volunteer services to the City. Records related to screening are to be treated as confidential information.

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- A. Fingerprinting and Background Screening.** Volunteers may be required to submit to background and Live Scan fingerprint checks prior to being selected and placed in some assignments. Human Resources will be responsible for providing screening guidance regarding background and Live Scan checks.
- B. Health Screening.** Some assignments require volunteers to be tested for tuberculosis if they will be working with vulnerable population groups. The City may have health and vaccination requirements in place for volunteers.
- C. Reporting Safety Concerns.** Volunteers who have regular contact with vulnerable population groups should ensure a report is made to their main staff contact if concerning treatment of people is observed or suspected.
- D. Credentialed Services.** Departments utilizing volunteers for which certification or licensing is required, must ensure up-to-date accreditation.

III. Orientation and Training

Once volunteers have been selected for their volunteer assignment, they will engage in an onboarding process which will inform volunteers about applicable City, department, and Office policies procedures, programs, and safety regulations.

- A. Badging.** To approve and provide access to assigned areas, City departments that maintain volunteer programs shall coordinate with Public Works—Facilities to ensure volunteers are badged, that badges visibly reflect the volunteer status of individuals, and that access is only granted for time and places where the volunteers are assigned duties.
- B. Roles.** The department/program staff members supervising volunteers should have primary responsibility for the design and delivery of the onboarding and training of their volunteers. In addition to basic safety, training on the services they will provide will also be provided by the department's Volunteer Program Coordinator and/or supervising staff.
- C. Content.** Volunteers will receive adequate instruction and training to ensure they can perform a task properly and safely. The timing and methods for delivery of such training should be appropriate to the complexity and demands of the assignment and the capabilities of the volunteer. Volunteers will be informed of any hazards they may encounter while performing volunteer service, emergency procedures for the sites where volunteers will perform services, and personal protective equipment that may be required for the performance of assigned tasks.
- D. Necessary Equipment.** The department will provide any necessary equipment and supplies for the assigned task. Volunteers will be informed of what equipment must be returned to City at the end of the volunteer assignment.

IV. Supervision and Support

Departments will be responsible for the supervision and recognition of volunteers. Departments should conduct a periodic review of their volunteer programs to evaluate their effectiveness and to identify areas for improvement or improved support.

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- A. Supervision.** Each volunteer must have a clearly identified primary City supervisor who is responsible for the direct management of that volunteer. This City supervisor shall oversee the services of the volunteer, be available to the volunteer for consultation and assistance, and perform an ongoing evaluation to gauge that volunteer service is consistent with program goals, expectations, safety considerations, and the needs of the client(s).

Where departments work with special programs that require certification of work, the department shall have documented program rules and processes to ensure compliance with that program.

- B. Retention.** Providing volunteers with clear expectations and ongoing support contributes to their long-term fulfillment and participation. City staff who supervise volunteers should include regular communication, training, opportunities for skill development, and time to connect and bond with teammates in assigning duties. This also means matching volunteers with tasks and projects that align with their interests, skills, and goals.
- C. Injuries While Performing Volunteer Services.** All volunteers shall immediately report all injuries or incidents to their City supervisor or volunteer administration staff. The City's standard Workers' Compensation Incident report is to be used for the immediate recording of an injury. City staff should provide the injured volunteer with a Workers Compensation Injury Claim form ([DWC-1 form](#) accessible on the City intranet).
- D. Recognition and Appreciation.** Volunteers are valuable contributors to the City, staff, and residents. The City acknowledges the importance of formal recognition to attract, retain, and honor volunteers for their service. Volunteer recognition is the responsibility of departments, and City staff are encouraged to express their appreciation to volunteers in as many ways as possible, both formally and informally. Additional guidelines are detailed in the Volunteer Program Management Guide.
- E. Conclusion of Volunteer Services.** City staff who supervise volunteers are responsible for managing the transition process for volunteers who conclude their service with the City. Departments shall set their process to communicate volunteering assignments and conclusion; promptly convey that information to City staff; close access to equipment and/or materials; and transfer knowledge to other volunteers where appropriate.

Departments should maintain positive relationships with departing volunteers whenever possible, showing gratitude for their contributions, and ensuring a smooth transition for both the volunteer and the City as the volunteer's period of service ends.

V. Required Department Volunteer Program Elements

Once the determination has been made to use a volunteer(s), the department must identify the necessary components of the volunteer task or assignment and forward the information to the appropriate contact within their department and, if required or necessary, to the Human Resources Department and/or their HR Liaison and/or the Office Employee Relations for review.

- A. Volunteer Task/Assignment Description.** The departments will ensure volunteer tasks/assignments are documented and available. Details should include typical tasks to

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be performed, the number of hours requested, necessary skills, required training, anticipated duration of assignment, any potentially required screening, et al.

- B. Volunteer Application/ Interest Form.** Volunteer applications are part of the screening process and help to ensure proper placement based on interests or place-based opportunities. City departments, using their own form or the Citywide Volunteer Application and Agreement Form, will solicit applications from prospective volunteers. Applicant information may include: their availability, interests, emergency contacts, and an agreement to comply with the policies of the City of San José and the department where they are applying to volunteer. Depending on the assignments, volunteers may be subject to all applicable screening requirements.
- C. Volunteer Services Agreement.** The Volunteer Service Agreement applies to all volunteers. The purpose of this agreement is to register volunteers and to document their volunteer status. This agreement includes a required volunteer signature indicating their understanding of the terms of service with the City and agreement to adhere to City policies applicable to volunteers. A parental/guardian consent section is included to indicate permission given for minors to participate as a volunteer.
- D. Volunteer Code of Ethics Agreement.** The Volunteer Code of Ethics Agreement describes the City's expectations for a volunteer representing the City of San José and is part of the Volunteer Services Agreement. The applicant's signature is required to indicate compliance with this agreement while serving in a volunteer position with the City of San José.
- E. Confidentiality and Privacy.** Departments shall set appropriate standards and protocols for volunteers in their access, use, and securing of information related to their volunteer services with the City.
- F. Program Review and Reporting.** Departments shall conduct a review of their volunteer programs annually to assess their effectiveness and to identify areas for improvement or improved support. Each department shall provide a status update on their volunteer recruiting and placements, and volunteer activities/achievements.

VI. Citywide Coordination of Volunteer Programs

To improve the accessibility of volunteer opportunities for residents, City departments and the City Manager's Office shall coordinate common elements that support the ease of volunteering with City departments. At least annually, the City Manager's Office will convene City departments that maintain volunteer programs to review and update shared program elements and needs, including the following:

- A. Volunteer Guide.** At least annually, stakeholder departments are responsible for collectively reviewing and updating the guide.
- B. Language Support.** The City recognizes the need to communicate with the community and volunteers in the major languages used by residents. In administering City volunteer programs and in interfacing with community members, the City will take all reasonable steps to provide equitable access to opportunities, services, and information, bridging language proficiency and cultural background to engage potential volunteers in the community.
- C. Communications and Advertising.** How the City sets the publication sites, social media, and marketing strategies where programs can and will publish their volunteering

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opportunities. Agree on shared investments by departments where appropriate to create economies and further the reach of efforts. Share practices and tools for the use of social media channels, email, paid ads on social media or search engines, publishing website and webpage addresses, and recruitment text messages; templates for flyers and posters in high foot traffic areas; video and image libraries; information tables at community events, et al.

- D. Training.** How the City sets and updates the training materials used for volunteer orientation and any training updates for existing volunteers. Agree on shared investments by departments where appropriate to create economies and further common training needs and goals.
- E. Intake Form.** How the City sets and updates the common volunteer application form elements. Ensure the digital application tool is effective and current to the form approved by stakeholder departments.
- F. Online Portal.** Stakeholder departments are responsible for identifying and communicating to the Communications Office which department staff are responsible for maintaining the common City webpages and published resources for volunteer opportunities and access.

Approved:

 Jennifer Schembri
 Director of Employee Relations
 Director of Human Resources

 August 31, 2023

Date

Approved for posting:

 Jennifer A. Maguire
 City Manager

 August 31, 2023

Date