

Volunteer Counseling and Dismissal Checklist

(Name)

Prior to Making A Decision	Yes	No
Have you reviewed organizational policies and procedures related to volunteer personnel issues?		
Is the individual's enrollment/personnel file current? (position description, application, correspondence, meeting notes, training, etc.)		
Has the situation been carefully researched?		
Have multiple options been considered for dealing with the volunteer's behavior or inability to fulfill their responsibilities, as were shared in signed waivers, training, in the form of a position description and/or correspondence?		
Documentation		
Has written documentation including the facts, as you believe them to be true been completed?		
Do you have signed and dated documentation from other people who were involved in the incident?		
Has a plan of improvement been determined to counsel and correct the specified behavior(s)/action(s) that are unacceptable? Has a period of time been established for the plan of improvement?		
Is the documentation and plan of improvement supported by specific violation of the volunteer behavioral agreement/waiver, Volunteer Agreement, Position Description, Working with Minors/Civil Rights policy, or guidelines for a sanctioned 4-H event?		
Taking Action		
Have you addressed the issue with the individual in a non-confrontational manner and taken steps to counsel them?		
Do all counseling sessions (phone calls, emails, letters, etc.) with the volunteer relate to the issue(s) documented?		
Have you remained neutral in collecting information and documenting counseling sessions?		
Does the volunteer have knowledge of the issue or infraction?		
Have you allowed the volunteer to share his/her "side" of the issue?		
Does the volunteer understand why this is an issue or infraction which must be addressed?		
Does the behavior require counseling, education or re-education?		
Is the behavior severe enough to warrant dismissal?		
Is this decision for dismissal consistent with other volunteer dismissals?		
Are you proceeding at an appropriate pace?		
Communicating Actions and Decision		
Have you arranged for uninterrupted privacy to meet with the volunteer?		
Have you considered who (CED, DPS, DD, State 4-H Office) should be informed/consulted about the corrective action or dismissal?		
Does a prepared statement need to be developed before the meeting?		
Have you prepared correspondence for the volunteer that clearly communicates future expectations or the actual dismissal of the volunteer?		