

# VOLUNTEER MANAGEMENT SYSTEM

A management system for recruiting, engaging, and retaining volunteers in the 4-H Youth Development effort.



## OSU EXTENSION 4-H YOUTH DEVELOPMENT

Administered by the  
Oklahoma Cooperative Extension Service

Adopted 1998

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## Portions of this system were adapted from:

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University of Missouri Cooperative Extension Service Youth Protection Policy

University of Arizona 4-H Volunteer Management Plan

University of Minnesota Cooperative Extension Service Youth Protection Policy

North Carolina State University Cooperative Extension Service Volunteer Management System

Northeast District 4-H on TRAC Program Guide – Oklahoma Cooperative Extension Service

Oklahoma 4-H for Century III – Oklahoma Cooperative Extension Service

North Dakota State University Cooperative Extension Service - Volunteer Selection Process

Rutgers Cooperative Extension, New Jersey Agricultural Experiment Station – Formal System for Resolving 4-H Volunteer Personnel Issues, Revised 2002

**Originally compiled by:  
Oklahoma District and State 4-H Staff  
in cooperation with  
State 4-H Volunteer Task Force**

# Oklahoma 4-H Volunteer Management System

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## **OKLAHOMA COOPERATIVE EXTENSION SERVICE POLICY FOR IMPLEMENTATION AND MAINTENANCE OF VOLUNTEER MANAGEMENT SYSTEM**



OCES Educators responsible for 4-H Youth Development programming in his/her respective county/unit will be held responsible for the implementation and management of the Oklahoma 4-H Volunteer Management System. Each county will use the same system and procedures.

Oklahoma has one 4-H program with three Land Grant Universities: Langston, Oklahoma State, and College of the Muskogee Nation with a 4-H Youth Development mission. OCES county offices and Extension educators are responsible for providing volunteer management system support for their respective county(s).

OCES Educators are responsible for having a 4-H volunteer and/or potential volunteer complete the procedures as stated in the Volunteer Management System Manual. It is expected that all individuals who have the potential of working with youth unsupervised, as a chaperon, or who may be transporting children (other than their own) will complete and maintain the certification process to serve as a 4-H volunteer in Oklahoma 4-H program.

District and State OCES staff will provide education and support to County Extension Educators to facilitate the management process. Documentation and accountability for the management system will be the responsibility of the county Extension Educator in cooperation with his/her respective District Specialist, District Director, and State 4-H Office.

The fall of 2012 the OSU Board of Regents reviewed, endorsed, and commended the procedures outlined in the 4-H VMS manual as the MINORS PARTICIPATING IN OSU-RELATED ACTIVITIES AND PROGRAMS (Working with Minors/WWM) Policy # 1-0135 was developed and implement. WWM was adopted March 2013 by OSU.

### **What is a Volunteer Delivery System?**

A volunteer delivery system focuses on the total development of the individual(s) who serve in a volunteer capacity. The system provides the framework for working with volunteers.

Oklahoma's system is based on the seven phases of the I.S.O.T.U.R.E. model, which supports individual growth and enhances 4-H's ability to address local challenges and opportunities.

The Volunteer Management system provides OCES and staff with a structure for recruiting, educating, engaging, and retaining volunteers as an on-going part of their job responsibilities.

## Purpose of the Oklahoma 4-H Volunteer Management System



- ✿ To ensure a safe and positive environment for youth involved in Oklahoma Cooperative Extension Service 4-H Youth Development programs.
- ✿ To provide documentation for volunteer activities in Oklahoma 4-H programs and to strengthen liability coverage for volunteers under the State of Oklahoma Governmental Tort Claims Act.
- ✿ To assist in the selection, placement, retention, and management of volunteers for Oklahoma 4-H Youth Development programs.
- ✿ To develop 4-H Volunteer competencies through continuing education activities.

Volunteers have been and will continue to be a valuable part of the Oklahoma Cooperative Extension Service and Oklahoma 4-H Youth Development programs. These individuals dedicate many hours for the benefit of Oklahoma's youth. OCES depends on volunteers to play a major role in the success of its programs.

Traditionally, 4-H volunteers have been positive role models that have the best interest of the youth and the 4-H program as their primary focus. However, we must realize that people, families, 4-H members, and most importantly, society have changed. OCES can no longer assume that Extension professionals know the personal background of everyone who serves in a volunteer role for the 4-H program. Child abuse, liability, accountability, and credibility are concerns that confront every youth organization in our country. We must take the appropriate steps to ensure a safe and positive environment for everyone involved in the Oklahoma 4-H Youth Development program.

## What is a Volunteer Manager?



A volunteer manager is an Extension educator. The educator is a paid individual within OCES committed to providing ongoing leadership for a volunteer work force. The role of the volunteer manager (or volunteer administration professional) is like a human resource professional that is responsible for paid staff. OCES professionals will be provided on-going education to develop their skills as Volunteer Administration professionals.

Lee and Catagnus (1999) state that as a volunteer manager “you must consciously and continually focus on two things: 1) your own performance, i.e., the degree to which you practice each of the necessary aspects of supervision; and 2) building relationships that are shaped by an awareness of the uniqueness of each volunteer. In other words, as a supervisor you must look first at yourself and then at your relationships with those you supervise.”

In *Supervising Volunteers* there are ten significant ways a volunteer manager can empower them to be successful in their work. Success for the volunteer will mean success for the organization because they will remain with the organization.

1. **Express your passion for the mission of the organization and the goals of the work unit.** Volunteers desire to see supervisors who are committed and enthusiastic about the purpose and mission of the organization. It is your responsibility to communicate how each piece fits into the big picture and contributes to the mission and objectives of the 4-H program.
2. **Demonstrate your competency.** Volunteers will expect you to be an expert in the work to be done. This necessitates a volunteer manager focusing on their own competency so the individual can 1) answer questions, 2) be an effective coach and 3) serve as a good role model. You may not be able to answer every question but knowing how to get the answers and extending yourself to do so certainly demonstrates effective competency.
3. **Reflect a caring attitude toward the whole team – individually and collectively.** Volunteers want a manager who cares. Volunteers who work with a negative and insensitive supervisor are likely to feel used, demeaned and will leave the organization. A good volunteer manager will encourage team members to care about each other and encourage a peer relationship between paid staff and volunteers. When conflicts arise, a good manager does not prejudge with the attitude “volunteers are always right” or “volunteers are never right.” Caring means encouraging a volunteer who is really trying hard to seek more training, so they can do better work.
4. **Be accessible and approachable.** A volunteer manager needs to be deliberately accessible to volunteers to answer questions; provide feedback and information; and maintain a relationship. Being approachable means watching your mood. Offer alternatives if that moment is inconvenient because of a deadline but assure the volunteer of your interest. Being accessible and approachable does not mean that you must be open to unlimited socializing.

5. **Aim for consistency.** The most important form of consistency is consistency in your words and your actions. Volunteers who experience a degree of inconsistency will be confused, frustrated, and unproductive. As a volunteer manager you must create stability: a balance between the need for change and growth and the need for consistency. See that change happens in an orderly way and seek input from the whole team. When this is not possible, explain the reasons for change and allow volunteers to express their views.
6. **Provide a position description.** Think of the position description as a “word picture” of good performance. Without a clear description of the job, volunteers cannot know their responsibilities.
7. **Offer top-notch training.** The interview and placement process helps match volunteers and the jobs. Training volunteers reflects your belief in their potential. It further prepares them for their work, gives them an opportunity to integrate their knowledge and previous experience into the unique characteristics of the 4-H program and provides an opportunity to establish relationships with other volunteers and staff. Thoughtful attention needs to go into the planning of volunteer training for without it, learning will be, at best, inefficient and at worst incorrect. The consequences may include serious mistakes. There are three types of training: orientation, initial training, and continuing education/support.
8. **Provide feedback.** Your obligation to provide feedback is perhaps the most important way to empower volunteers. Simply put, give volunteers feedback through simple and frequent comments on their work. It is making observations that enable volunteers to see the connection between what they are doing and the goals of the 4-H program. It is praising someone for handling a difficult situation or coaching someone in a helpful way who has a performance problem. Frequent feedback should be used in conjunction with regular formal evaluation.
9. **Share information.** The single most effective way to convey to volunteers that you trust them is to share information. Volunteers who do not receive adequate information are left to guess, start rumors, or be guided by misinformation. Share information via social media, posting on a webpage, newsletters, meetings, minutes mailed/emailed to someone unable to attend a meeting, etc.
10. **Express your appreciation.** While a formal expression of appreciation is essential, continual, and informal words and deeds of appreciation are equally valuable.

As a coach, mentor, guide, leader, and supporter your role as a volunteer manager is very important in making a volunteer effective, successful, and eager to give their best to the 4-H program.

Check out an invaluable resource from Everyone Ready © titled *Keeping Volunteers Motivated (So They Stay!)* the material complements and enhances each section of the ISOTURE model described in this manual. Resources can be found at <http://www.4-h.org/resource-library/professional-development-learning/4-h-volunteer-development/>. (2023)





## Professional Development for Volunteer Managers

The 4-H.org houses [professional resources](#) (2023) organized under the following headings:

- ✿ **Marketing Resources:** The 4-H Marketing Online Resource Center is the go-to resource for 4-H professionals and volunteers for all of their 4-H marketing materials including photos, templates, ads, and logos.
- ✿ **Curriculum Development:** Resources for 4-H professionals interested in writing, evaluating, reviewing, and publishing high quality 4-H educational materials.
- ✿ **Professional Development:** 4-H is committed to delivering high quality positive youth development throughout the entire 4-H system. It is important to provide high quality, consistent, and accessible development opportunities for 4-H professionals and volunteers.
- ✿ **[Volunteer Development:](#)** 4-H Volunteer resources cover the subjects of Personal Readiness, Organizational Readiness, Engagement of Volunteers, Education of Volunteers, and Sustainability of Volunteer Efforts.
  - **Everyone Ready**
  - **VRKC Model & Lesson Plans:** 4-H Volunteer resources cover the subjects of Personal Readiness, Organizational Readiness, Engagement of Volunteers, Education of Volunteers, and Sustainability of Volunteer Efforts.
  - **Volunteerism for the Next Generation: Fact Sheet Series**
    - Introduction to Volunteer Delivery System, Volunteerism PRKC, and ISOTURE
    - Infrastructure to Support a Volunteer Delivery System
    - Personal Readiness - Philosophy, Trends, Advocating
    - Organizational Readiness - Creating a Climate, Identifying Needs, Developing Volunteer Positions
    - Engagement of Volunteers – Recruiting and Selecting
    - Review and Analysis of Volunteer Delivery System
    - Volunteers
    - Education of Volunteers – Orienting, Educating, Adult Development and Learning Theory, Risk Management
    - Sustainability of Volunteer Efforts - Supervising and Coaching, Managing Performance, Recognizing Volunteers, Evaluating Volunteers
    - Management Volunteers (Green Taxi)
  - **4-H Volunteer e-Forum**
- ✿ **Common Measures:** Common Measures is helping 4-H continually improve programs so that we can reach even more young people with a life-changing 4-H experience.



## Seven Phases of the Volunteer Management System –I.S.O.T.U.R.E. Model

ISOTURE is an acronym that describes a systematic approach to volunteer development and management that offers individuals the opportunity to increase their ability to influence volunteers working with the Oklahoma 4-H Youth Development programs. It was originally proposed by Dr. Robert Dolan, North Carolina State University, and adapted for the Cooperative Extension System by Dr. Milton Boyce, National Program Leader, USDA, in the early 1970s.

1. **IDENTIFICATION:** *Identifying volunteer opportunities/needs within the organization. Developing appropriate written position descriptions for said opportunity. Consider skills necessary for the position description when recruiting from existing and potential volunteer resources.*
2. **SELECTION:** *Recruiting, selecting, and placing volunteers' best qualified (i.e., with appropriate knowledge, attitudes, and skills) for identified volunteer opportunity(s). A Volunteer Manager will recruit individuals to serve in various volunteer roles within the 4-H organization. These individuals apply to be a certified volunteer and are provided a position description as required by the University. (2015) Volunteers must apply online through the designated data management system. Paper application/enrollment was discontinued in 2016.*
3. **ORIENTATION:** *Informing selected volunteers to the role expectations of the volunteer position and the organization has a direct connection to retention. During this phase use the "Oklahoma 4-H Youth Development Orientation," to introduce the Oklahoma Cooperative Extension Service and 4-H organization; staffing; risk management; positive youth development, and volunteer roles and responsibilities. The second phase of the orientation is the OSU 4-H Youth Development Working with Minors Guidelines and Procedures. The third phase of orientation is completing the OCES Civil Right for Volunteers.*

The Extension Educator is responsible for sending the individual letter/email stating they are "officially" recognized as a certified volunteer with all rights, privileges, and responsibilities.

*\*\*Extension guidelines and procedures for certifying/approving volunteers can change. Be sure you are following the latest published expectations and procedures. (2023)*

4. **TRAINING:** *Stimulating and supporting a volunteer's efforts to acquire knowledge and to develop Oklahoma 4-H Volunteer Core Competencies (attitudes, skills, and behaviors – table in Resources) while improving the quality of their performance as a volunteer.*

A new volunteer will participate in Parent-Volunteer Continuing Education (CE) opportunities to attain knowledge (human development and/or subject matter), attitudes

(values and norms) and skills (technical skills) to improve their level and quality of performance. Extension professionals will intentionally plan and conduct quality programs which will enable program growth and retention. The educator's role is to facilitate the learning process with adult learners presenting content and examples of how it is applied in context. Based upon the role/position description, the volunteer is equipped and empowered to play an important role carrying out the 4-H mission. Training is an on-going process of educating, instructing, and coaching in formal and informal situations. CE/training is recorded in the online *data management system*.

4. **UTILIZATION:** *Volunteer Managers are to provide opportunities for volunteers to use acquired knowledge and skills in meaningful roles for the overall growth and success of the 4-H organization.* At this point, the volunteer is actively engaged and empowered in carrying out their role(s). OCES professionals are responsible for the ongoing education, communication, and support to assure a volunteer's success.
5. **RECOGNITION:** *Acknowledging a volunteer for their positive contributions to the organization is important.* Recognition should take place throughout the volunteer's term of service. Sometimes, recognition is tangible, in the form of thank-you notes, certificates and/or ceremonies. At other times, it is intangible, such as a simple "thank-you." Recognitions is about building relationships, consulting, and collaborating with volunteers as partners in the 4-H youth development effort.
6. **EVALUATION:** *Volunteer Managers are responsible for evaluating an individual's performance as a volunteer in the position assigned and within the total 4-H structure (local or county).* Annually or at another defined time the Extension educator/Volunteer Manager and volunteer meet to review the previous year's experiences, programming (as applicable), and goals for continued service. Be sure to review position descriptions during this process and re-assign positions/roles as agreed upon.

During the evaluation phase there is an opportunity to mentor, direct, coach, and celebrate. A written record of the session is signed by both parties and placed in the volunteer's electronic file/online data management system.

As needed, the time can be used to counsel and constructively guide individuals toward necessary personal and professional improvement as a 4-H volunteer. If a volunteer does not complete the necessary requirements/improvements, they can be placed on probation. Document agreed upon plan in writing, share copy with volunteer, upload a copy to their online file, and follow-up regularly with the volunteer.



Oklahoma 4-H Volunteer Management System  
**I.S.O.T.U.R.E. Model**

# Identify



**I Identify: Identifying volunteer opportunities within the organization and developing appropriate written position descriptions for them.**

- S Select: Recruiting and selecting the volunteers best qualified (appropriate knowledge, attitudes, and skills) for the volunteer opportunity. Selection includes the screening process.
- O Orient: Orienting selected volunteers to the role expectations of the volunteer position and organization.
- T Train: Stimulating and supporting volunteer efforts to acquire knowledge and to develop attitudes and skills that will improve the quality of their performance in volunteer positions.
- U Utilize: Providing opportunities for volunteers to use acquired knowledge and skills appropriately, for the overall growth and success of the organization.
- R Recognize: Recognizing and rewarding volunteers for the positive contributions they make to the organization.
- E Evaluate: Evaluating and providing professional feedback as to the individual's performance and continued growth as a volunteer.

## 4-H Volunteer Roles

4-H volunteers are individuals from whom OCES seeks a significant commitment of time, talents, and resources. These volunteers expect to be provided meaningful and worthwhile duties and responsibilities and the necessary training or education to accomplish their assumed role. The Volunteer Management System provides the framework for a volunteer delivery system.

4-H promotes positive relationships with caring adults, a safe environment, the opportunity for youth to develop mastery, and the ability to demonstrate their new skills in public service. These are the hallmarks of effective youth development programming. This is achieved through what we define as “eight essential elements.”

### YOUTH-ADULT RATIO FOR CLUBS AND 4-H PROGRAMMING

5 7 year olds Cloverbuds	8 14 year olds	15 17 year olds
One Adult to 6 youth	One Adult to 8 youth	One Adult per 10 youth

An adequate “**volunteer to youth ratio**” is necessary based upon the developmental level and needs of youth, setting, and project. Note in the table the “*youth-adult ratio*” which should exist in a 4-H club or programming efforts to successfully manage risk and more importantly to provide our youth with positive relationships with caring adults.

It is important that County Educators team with Clubs to recruit, certify and train multiple adult volunteers to work with any “one” 4-H club or group. All teens and adults who have direct and unsupervised contact with children must be certified volunteers. *Certification applies to more than just “Club Leaders.” (Added 11/2012, taken directly from CMS 9/2007)*

It is important that County Educators team with Clubs to recruit, certify and train multiple adult volunteers to work with any “one” 4-H club or group. All teens and adults who have direct and unsupervised contact with children must be certified volunteers. *Certification applies to more than just “Club Leaders.” (Added 11/2012, taken directly from CMS 9/2007)*

### **VOLUNTEER WORKING DIRECTLY WITH YOUTH**

**Organizational Leader:** An adult 21 or over who provides leadership to the overall organization and operation of a 4-H club (community or project). *Requires certification (updated 2012)*

**SPIN/Project Leader:** Arranges learning experiences for 4-H members enrolled in a specific project. *Requires certification.*

**Activity Leader:** Helps 4-H members to learn through group activities such as Share-the-Fun, Camping, Outdoor Education, etc. *Requires certification.*

**Teen Leader:** Assists with or takes complete responsibility for a learning group such as a 4-H project, activity, camp counselor, or special interest group. Teens cannot serve as “club leaders.” *Requires certification but no BC at this time.*

**Teen Advisor:** An adult who gives guidance and direction to 4-H teen leaders and works on programs to meet the needs and interests of older teens. *Requires certification.*

**Episodic Volunteer:** An individual who volunteers or is recruited for a single or short-term assignment, activity, event, or program. Examples include fair judges, assistants/helpers at 4-H events, or a guest presenter. These persons are not “certified” volunteers but must have some kind of documentation of their service, such as a letter/email requesting their service and a position description (required by the University as of 2015) of their responsibilities and a signed Form 5. *Does not require certification.*

### **VOLUNTEER WORKING WITH YOUTH & ADULTS**

**Volunteer At-Large:** Volunteers who serve 4-H at the local, county, district or state levels as described in this document. *Requires certification.*

## **VOLUNTEER WORKING PRIMARILY WITH ADULTS**

As the following adults will be working with adult audiences and serving more in the role of “volunteer at-large/episodic”, being certified sets an example and provides an informed volunteer base. **If at any time the volunteer is going to be working with youth unsupervised, they must be certified.**

**County 4-H Project Chairman:** Arranges for learning experiences for 4-H Project Leaders in a specific project and/or organizes county-wide events in a specific project (i.e., Public Speaking Workshop).

**County 4-H Activity Chairman:** Arranges for learning experiences for 4-H Activity Leaders in a specific activity and/or organizes countywide event/activity. (i.e., Share-the-Fun, Camp).

**Resource Volunteer:** Helps other volunteers by sharing special human or material resources (i.e., conducts new Parent Orientation, mentor for new club leader).

### **Parent-Volunteer Association Officers:**

Officers elected to conduct the business of Parent-Volunteer Association at the County, District, and State levels. Officers are elected by volunteers, from within the geographical area of the Association being represented. \*\* Refer to governing By-laws.

**Program Advisory Committee:** A community leader representative of the county’s diverse services and clientele. PAC serves as an advisory board for the 4-H Youth Development program. Assist in identifying needs and trends within the community, program thrusts, volunteer development and community support.

**Foundation Board Member/Fund Raising:** Community contacts that primarily assist in securing financial resources and support for the county 4-H program. Assist in budgeting resources and preparing a budget.

**Volunteer Advisory Committee:** Individuals who assist in screening and placing volunteers in the 4-H club program.

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## **Episodic Volunteering**

The word episodic as defined by Webster’s Ninth Collegiate Dictionary: **“Ep-i -sod-ic/ep-e-‘sad-ik”:** 1) made up of separate, especially loosely connected episodes; 2) of or limited in duration or significance to a particular episode, *temporary*; 3) occurring, appearing, or changing at usual irregular intervals, *occasionally*.

Episodic volunteers have an important role in the 4-H program due to the service they provide in short durations or at regular intervals for short periods of time. Activities or events sponsored by Extension and/or 4-H should provide volunteers with a position description describing expectations and responsibilities. This management practice is most critical for the episodic volunteer who does not receive the formal training of certified volunteers. Providing “position descriptions” keeps our program in compliance with the new Oklahoma State University Volunteer Guidelines effective September 2014. These guidelines ensure the University is in compliance with changes in Federal Labor Laws. (2015)

A prudent or good management practice is to use the liability waiver (WWM Forms 5) accompanied by a position description. (2015) The format and content of a position description is covered in the proceeding section, “4-H Volunteer Position Description.”

**A “position description” does not take the place of or circumvent the 4-H volunteer certification system.** Any volunteer who is continually called upon to assist with programming, transportation, chaperoning, and who has immediate contact with children

(especially unsupervised) should be certified *for their protection and the protection of the 4-H program*.

**Defined: Episodic service that is short in duration**

Volunteers who provide service that is short in duration can include:

- One-day volunteer/judge who assists with Share the Fun
- Person who transports fair exhibits to the state fair
- Guest speaker or instructor for a special program

Episodic volunteers assist the 4-H program for a pre-established time, with specific duties, and are truly finished at the conclusion of their agreement (letter/email with position description). These individuals are under the supervision of certified volunteers and/or Extension educators and are not left unattended with youth.

**Defined: Episodic service that occurs at regular intervals**

Some episodic volunteers choose to assist or work on an annual event/activity each year, assist as a workshop resource, or may be a community leader who serves on the Volunteer Advisory Committee (VAC).

**Considerations and Practices for using Episodic Volunteers**

Position descriptions, training, orientation, supervision, and supporting the volunteer’s efforts are all planned and implemented around the short-term nature of the job they have been asked to complete.

*Identify:* The volunteer manager who uses episodic volunteers must develop and use position descriptions unique to the work being provided. The development of an episodic volunteer program requires thoughtful consideration by OCES staff.

*Selecting:* Recruiting episodic volunteers will have similar elements as those used to “certify” 4-H volunteers. Short-term volunteers deserve an informal interview, position description and an oral and/or written orientation.

The development of a short-term volunteer program does not end with bringing the recruits through the door to the 4-H program. An episodic volunteer program also includes strategies to *sustain* and *support* the volunteer during their time of service.

*Orientation:* The episodic volunteer may question the validity of their job choice if they are forced to sit through an orientation designed for the long-term volunteer.

*Training:* The episodic volunteer does not have time to attend hours of training nor does the nature of the job require extensive training. The best method to develop and design training for episodic positions is to engage current experienced volunteers in orienting/training short-term volunteers.

*Utilize:* As a volunteer manager, your role is to sustain (to supply with sustenance: nourish) the episodic volunteer. This differs from the process of maintaining and supporting the long-term/certified volunteer. Maintenance refers to continued support or preservation of an extended relationship. The difference between sustaining and maintaining is subtle, but significant for the short-term volunteer.

Certified 4-H volunteers and Extension educators must be in immediate supervision of episodic volunteers who have contact with youth. Since episodic volunteers have not



received extensive training required to be recognized as a “certified” 4-H volunteer, they do not have the benefit of being recognized as a representative of the University. Thus, they are not afforded the same level of liability protection provided to certified 4-H volunteers.

*Recognize and Evaluate:* Recognize and adequately thank the volunteer for their time, talents, and resources. If there is a problem with their service which cannot be overlooked due to behavior, safety and/or liability it needs to be documented and discussed with the volunteer.

## 4-H Volunteer Position Descriptions

Position descriptions should be developed and used for both certified and episodic volunteers. Position descriptions assist the volunteer manager in communicating the expected scope and depth of responsibility and prepare the volunteer to assume and carry out their role. Sample position descriptions and a template for club and county roles are [posted online](#) and under Reference Tools.

The following are definitions from the Oklahoma Governmental Tort Claims Act that relate specifically to volunteers and paid staff. These definitions have a direct impact upon the degree of protection that is provided under the Act to the paid or volunteer employee when a tort is alleged.

*“Employee” means any person who is authorized to act in behalf of a political subdivision or the state whether that person is acting on a permanent or temporary basis, with or without being compensated or on a full-time or part-time basis.*

*“Scope of employment” means performance by an employee acting in good faith within the duties of his office or employment or of tasks lawfully assigned by a competent authority including the operation or use of an agency vehicle or equipment with actual or implied consent of the supervisor of the employee but shall not include corruption or fraud.”*

As provided by the Act, volunteers and paid staff are protected under the Act equally, when they are working within the realm and scope of their employment. The easiest way to determine what a person's scope of employment is to operate with a position description that is inclusive enough to cover their major duties, yet not so exclusive that there is not freedom to do normal tasks related to the duty.

There are several 4-H publications with sample position descriptions that can be used with volunteers.

- Oklahoma 4-H Volunteer Management System
- 4-H TAXI/National Framework for Volunteerism
- 4-H Project Guides - Several 4-H project guides have specific position descriptions for volunteers in that project area (i.e., Shooting Sports Program)

Another way to define a person's “scope” is through a written letter/email of invitation or a contract. When asking someone to come and conduct a workshop, present a program, or judge an event be sure to follow-up the verbal conversation with a written document defining the date, time, location, and other specific details such as what you expect them to do. This type of documentation defines the scope for which a person is employed (even

if they are doing the task without compensation) as required by the Oklahoma Governmental Tort Claims Act.

Effective 2015, the University wants volunteers (certified and episodic) to complete a liability waiver when in the act of volunteering for our program. All certified volunteers complete the waiver (WWM forms 5) as part of their annual enrollment process. A prudent or best management practice for episodic volunteers is to use the liability waiver (WWM Form 5) accompanied by a position description when there is a 4-H activity or event sponsored by extension/4-H.

All certified 4-H volunteers have a generic position description as part of the enrollment process. Club/Cloverbud leaders have an official position description signed annually as part of their enrollment process. These two items will cover the bulk of the certified volunteer efforts but may not cover volunteering for a “specific duty,” i.e., helping with Share the Fun which is not part of the job of a club leader or project leader.

At the local level, if a volunteer is following the good management practice of completing and filing form 7, the Activity and Intent Form, they are probably prepared and communicating expectation to parents and volunteers. If the activity has an above average level of risk, it would be prudent for the 4-H leader to have (non-certified) parents/chaperones/other volunteers complete the liability waiver (form 5) and file along with form 7.

Club leaders, project leaders, activity leaders, extension educators, etc. are responsible for understanding the policy and to the best of their abilities to follow the expectations of Oklahoma State University.

### **Writing a Position Description**

A position description does not need a lot of detail, but it should include enough information that it reflects the general duties and responsibilities. A good practice and professional way of doing business is to send a timely email/letter and/or orientation in advance. It shows the 4-H program is organized and respects the valuable time and services being shared. Secondly it is a good risk management practice because it provides 4-H, Extension, and the University a level of protection.

In a simple position description, the volunteer is thanked for volunteering their service. The individual is provided the date, time, and location of the event. In the following example, a generic email/letter has been prepared. The volunteer(s) is/are being informed they will be assisting with one or more of the following activities:

- Judge – Working with an appointed assistant you will be evaluating presentations and providing constructive comments which will aid in the 4-H’ers growth. General comments will be made to the room and individual comments will be written on the score sheet.
- Judges Assistant – introducing participants, timekeeping, recording results, assisting the judge
- Door Keeper – monitoring the flow of traffic in and out of rooms during the contest
- Registration – check-in, informing judges of cancellations or changes, and other general needs to keep the contest moving smoothly

- Refreshments – set-up, maintain and clean-up of the refreshment area

In the correspondence, the volunteer is asked to complete and return the attached Form 5 – by email or the day of the event.

April 3, 2025

Dear Isobel,

Thank you for volunteering to assist with the Green County Speech contest on May 1, 2024. The contest will be held at the Church of Christ, 451 East Alameda Street in Norman, OK. The event begins at 7 pm but we ask that all volunteers arrive by 6:30 pm for a brief orientation and last-minute instructions.

You will be assisting with one or more of the following activities:

Judge – Working with an appointed assistant you will be evaluating presentations and providing constructive comments which will aid in the 4-H'ers growth. General comments will be made to the room and individual comments will be written on the score sheet.

Judges Assistant – introducing participants, timekeeping, recording results, assisting the judge

Door Keeper – monitoring the flow of traffic in and out of rooms during the contest

Registration – check-in, informing judges of cancellations or changes, and other general needs to keep the contest moving smoothly

Refreshments – set-up and clean-up of the refreshment area

Please complete and sign the attached form. It can be returned by email to [chris.clover@okstate.edu](mailto:chris.clover@okstate.edu) or returned the day of the event.

On behalf of the participants, thank you for volunteering your time.



Chris Clover  
Green County Extension Educator  
444 County Line Road  
Norman, OK 73069  
405-321-4774

Attached: Form 5 Statement of Understanding



Oklahoma 4-H Volunteer Management System  
**I.S.O.T.U.R.E. Model**

# Select



I Identify: Identifying volunteer opportunities within the organization and developing appropriate written position descriptions for them.

**S Select: Recruiting and selecting the volunteers best qualified (appropriate knowledge, attitudes, and skills) for the volunteer opportunity. Selection includes the screening process.**

O Orient: Orienting selected volunteers to the role expectations of the volunteer position and organization.

T Train: Stimulating and supporting volunteer efforts to acquire knowledge and to develop attitudes and skills that will improve the quality of their performance in volunteer positions.

U Utilize: Providing opportunities for volunteers to use acquired knowledge and skills appropriately, for the overall growth and success of the organization.

R Recognize: Recognizing and rewarding volunteers for the positive contributions they make to the organization.

E Evaluate: Evaluating and providing professional feedback as to the individual's performance and continued growth as a volunteer.

## Confidentiality



**Confidentiality is imperative for members of the VAC.** The Extension educator is responsible for communicating the OCES policy regarding information reviewed and/or obtained about an applicant. Each committee member must read and sign the *Confidentiality Statement*. (See **Forms**)

To avoid defamation claims, the following risk management strategies are strongly encouraged to be adopted and practiced by County Extension staff in the screening, interviewing, and hiring of volunteers.

The OCES confidentiality requirements **must** be communicated by the Extension educator to all persons who will have access to private/confidential information. This includes County Extension educators, 4-H program assistants, support staff, and any volunteer with access to the volunteer’s application, related materials and/or reference checks. These persons are asked to sign the *Confidentiality Statement* (see **Forms**) agreeing to protect the privacy of applicants and volunteers. The signed form is to be kept on file in the Extension office.

As of September 1, 2017, all reference forms, applications, and notes are to be uploaded and maintained in the volunteers profile in the online data management system.

All information must be kept confidential. Only the Volunteer Advisory Committee, County Extension educator and/or state/district personnel should be involved in discussing an applicant’s character or background as it directly relates to the position and the needs of the 4-H program. Strive to factor only truthful information into the investigation and take reasonable steps to keep information confidential.

Under no circumstance should information obtained through reference checks, applications, interviews, or background checks be disclosed. Consideration or discussion of an applicant or any volunteer personnel issues is prohibited outside the Volunteer Advisory Committee, or authorized state and district personnel.

Never release the resulting information to people who have no legitimate need for the material. Keep the circle of people with access to confidential information limited!

### **Confidentiality Statement**

*I, the undersigned, do hereby acknowledge that in my service to the Oklahoma 4-H Youth Development Program, I will have access to confidential information contained in the volunteer applications and/or records of volunteers serving the organization. I agree that I shall not disclose any such confidential information maintained by the Oklahoma 4-H Youth Development Program to any unauthorized person, and I will adhere to confidentiality guidelines of the Oklahoma 4-H Youth Development Program. I acknowledge that a proven breach of confidence could be cause for termination from my position.*

Confidentiality Statement – Download form located under Forms or online [“Forms”](#) (2023).

## Volunteer Advisory Committee

The purpose for a Volunteer Advisory Committee (VAC) is to assist the Extension educator in reviewing and screening applicants as potential volunteers for the Oklahoma 4-H Youth Development program.

The Volunteer Advisory Committee (VAC) is responsible for:

1. Reviewing all volunteer applications.
2. Assisting in collecting additional information on applicant, could include but not limited to an interview, reference checks, local background checks, etc.
3. Recommending acceptance or denial of applicants based on #2.

The Extension educator has ultimate responsibility for committee decisions; this includes decisions based on a committee's recommendation.

### VAC Membership

The committee is to be composed of at least two individuals who have experience in human relations, youth development, law enforcement or is experienced in screening and placing volunteers. VAC should **not** be composed of active 4-H volunteers or extension staff. (2019) The Extension educator will chair the committee.

Extension education is to provide each member of the VAC a position description, confidentiality statement and conduct a VAC orientation. Annually, VAC members are to be recorded in the online data management system. \*\* Refer to reference materials posted for managing the data management system.

### Orientation for VAC Members

The purpose for the orientation process and periodic updates is to keep the VAC informed of appropriate screening, interviewing, and reference practices, as well as University guidelines and procedures. Volunteers are “employed” by OCES for “volunteer” roles. See additional information contained in the sections on screening and interviewing applicants.

In preparing for the orientation the Extension educators will be responsible for referencing the appropriate sections of the Volunteer Management System manual, Oklahoma 4-H Volunteer Core Competency curriculum and Oklahoma 4-H for Century III.

### VAC members should receive adequate information on the following topics:

1. Introduction to the Volunteer Management System (page 6 of VMS)
2. Mission and objective of Oklahoma 4-H Youth Development Programs – refer to chapter one of *Oklahoma 4-H for Century III* for highlights or Unit 1 Volunteer Core Competencies.
3. Confidentiality requirements – Signed statement
4. OSU's Affirmative Action statement
5. Overview of 4-H position descriptions for local and county volunteer roles (page 17 and/or [website](#) to assist VAC in placement of volunteers.

6. Use the section titled “Reviewing Volunteer Applicants” to inform VAC how to review applications and what can and can’t be done when conducting reference checks, and interviewing applicants. Because of the sensitive nature of the information obtained from and about applicants, as well as laws governing the University and Extension, the VAC needs to be adequately informed.

**TRAINING SUGGESTION** - Conduct an active listening exercise with VAC. Split the group into pairs. Have one person from each pair be the speaker and the other the listener. The speaker will tell the listener about a problem he or she is concerned about. The problem may be with a friend, neighbor, co-worker, relative, pet, etc. Tell the listener to try to get the speaker to tell the listener everything there is to tell about the situation. The listener **may not** talk about himself or herself or about anyone the listener knows who has had a similar experience. The listener **may not** change the topic. The listener **may not** offer his or her own opinion about the subject. The listener may only ask questions to get the speaker to tell the listener about the subject.

After about five minutes, stop the exercise and ask the pairs the following questions:

**For listeners**

- How did it feel to be a listener?
- Did the listeners experience any frustrations?
- Did the listeners find it hard to think of open probes?
- What was the thing you (the listener) most wanted to do while the other person was talking?

**For speakers**

- How did it feel to be the speaker?
- Did you feel like the listener understood you?
- Did it help you to find a solution to the problem you were talking about?
- How do you feel toward the listener?
- Did the listener keep to the rules and not change the topic of conversation or offer opinions, solutions, or similar stories?

## Processing Applicants with VAC

From the date a volunteer makes application (i.e., enrollment date stamp), the entire certification process is to be completed within 90 days. (2017)

Extension staff and VAC members should establish a schedule for reviewing applicants. Every effort should be made to review applications and respond in a timely manner. The Extension Staff and VAC will collect additional information on applicants using a variety of methods including:

- Personal interviews – Form for guiding interview process located in the Forms section of this manual.
- Reviewing Application
- Reference checks – A form(s) for doing mail, phone and face-to-face reference checks are located in the Forms section of this manual.
- Local background check(s) – Contact local law enforcement for activity which may not be found with a national screening (2018)



Written minutes or notes should be kept of every VAC meeting and/or action. VAC members should provide written acceptance or denial (signed application, email, etc.) The materials are to be filed/uploaded in accordance with the Volunteer Management filing system outlined in this manual.

## WHO TO CERTIFY

Our responsibility as Extension educators is to certify as many volunteers as needed to provide safe quality programming insuring an adequate ratio of youth to adults. The certification process and subsequent continuing education strengthens our total program by providing knowledgeable individuals who assume 4-H leadership roles on the local and county level.

All adult and teen volunteers who will be in contact with youth one-on-one without the immediate supervision of a certified 4-H volunteer(s) or Extension Employee must be certified volunteers. This includes but is not limited to: Club/Cloverbud/Project/Activity Leaders and/or General Club Volunteer, chaperones, adults transporting youth, teen leaders, camp counselors, District and State Leadership team (Ambassadors and Officers), etc.

A **Background Check** is necessary for A) any New Volunteer, B) a Volunteer with break in service, and C) a Veteran Volunteer up for re-certification. (2018)

### Do current volunteers require a Background Check?

- All volunteers regardless of tenure with 4-H, or association with a school, faith-based group, another youth serving organization, employment or military service will receive an initial screening and be rescreened every four years with no exceptions.
- If there is a one-year break in service (inactive enrollment) a new background check will be required for the volunteer.
- Volunteers working with some grant funded programs will be required to pass a background check.

The Extension office initiates the Background Check in Sterling Volunteers (SV). *\*\* Follow SV help sheet for background check.* Once entered by the office SV initiate an email contact with the applicant. The applicant will be responsible for completing the process online through SV. The county Educator/staff will be responsible for following up with the volunteer, in a timely manner, to ensure the SV online process has been completed.

**Sterling Volunteers** - All staff must complete training through OSU Learning Management System before being granted access to Sterling Volunteers. Training course is housed on the OSU Human Resources [website](#). Log in using your university credentials.

Per OCES Administration and Legal Counsel, the county Extension office will be responsible for completing each step of the certification process. The certification process must be completed within 90 days of application/enrollment being submitted/entered in online data management system.

**A "new" applicant is not to have unsupervised contact with youth until each step of the certification process is completed.**

Returning volunteers are not to have unsupervised contact with youth if they have not completed the enrollment process by Dec 1 each year.

### **Who completes the Certification Process?**

- Any person representing OCES who works directly with children unsupervised.
- Teen who wants to serve in a leadership role (i.e. Teen Leader, Camp Counselor, Officer, etc.)
- District and State Leadership Team
- Chaperones for local, county, state, and out-of-state activities
- Project/SPIN, Activity, Club and Cloverbud leaders
- General or At-Large 4-H Volunteers working unsupervised with youth.
- Volunteers transporting youth (other than their own child) as a 4-H representative.
- 4-H volunteer transferring from another state
- Community Citizen serving as a “subject matter expert” working unsupervised with youth.
- Volunteer certified by another youth serving organization
- Volunteer certified by a recognized organization or specialized field. This includes public school teachers.
- Every fourth year a volunteer must be re-certified (2018)
- \*\*Any volunteer with a one-year lap in service (i.e., inactive the previous year) must have a background check run even if they are not up for recertification. (2018)

### **Who does not complete the certification process?**

- A certified Oklahoma 4-H volunteer transferring between counties.

## **CERTIFICATION OF 4-H TEEN LEADERS, 4-H CAMP COUNSELORS & TEEN VOLUNTEERS**

A teen (13-18 years of age) is any young person under the age of 18 who is volunteering for some 4-H responsibility. 4-H encourages age-appropriate development and training of our teen volunteers. OCES staff and certified adult volunteers should work closely with young people to place them in volunteer roles that are appropriate to their skills and maturity.

We certify teens, providing them with the same information as adults being certified. This is important because 4-H provides leadership opportunities where teens assume responsibility for other youth and in many situations, they are providing direct supervision with minimal and sometimes no adult supervision. The certification of teen volunteers is not intended for the teen to be assuming those roles/responsibilities intended for “adult” volunteers. (2012)

As with all certified 4-H volunteers, teens should have documentation (i.e., position description, orientation/training, WWM and OCES Civil Rights for Volunteers) on file when fulfilling a specific volunteer role such as camp counselor, project leader, district/state officer, etc. The documentation provides liability protection under OSU policy.

### **GENERATIONAL VOLUNTEERS (2015)**

Oklahoma 4-H has a wide range of ages representing volunteers in our program. It can be challenging to embrace this *diversity* and avoid ageism. Generational diversity matters to our organization because:

- There must be an understanding and respect of the history and experiences each individual brings to the position.
- Success comes from offering diverse and flexible volunteer programs/opportunities/tasks.
- Services must be pertinent to the changes taking place. If you have been doing something for 20 years then possibly the services need to change with the times/technology/interests.
- Assumptions and generalities regarding communication and marketing are not the norm any longer. We have tech savvy seniors and tech illiterate GenX.

To learn more about generational trends in nonprofit organizations read Peter Brinckerhoff's Everyone Ready® Training titled [Keeping Volunteers Motivated \(So They Stay!\)](#). (2015)

## STEPS IN CERTIFYING NEW AND RETURNING VOLUNTEERS

There are no short cuts in certifying a volunteer. Each step is to be completed, documented, and recorded. Any required orientation or review is to be completed in its entirety and not amended. Audits will be conducted by the District and State 4-H office to ensure procedures are being followed.

1. **Online Enrollment/Data Entry** – Maintain timely training and updates for enrollment system(s) being used by Extension and/or 4-H. Do not approve **any** enrollment until ALL requirements are completed AND forms/letters/notes/etc. are uploaded to the individual's profile.  
Once ALL annual expectations are completed the individual is recognized as an Oklahoma "Certified 4-H Volunteer" with all the rights and responsibilities. This includes the annual designated number of continuing education credits.
2. **Potential Volunteer online application/enrollment.** - *There is no paper application for adults. The county office cannot enter a volunteer's electronic signature.*
3. **Teens** (see page 14 and 26 for details) must be enrolled and active. Any required or designated training/continuing education for their identified role will be recorded in online data management system. As of 2023 background checks are not being completed on teens.
4. **Interview Applicant, Check References and/or involve Volunteer Advisory Committee** – Extension educator and/or VAC will visit (formally/informally) with the applicant and check references (upon request/as needed).
5. **Communicate** – In a timely manner keep volunteers informed of in-person/online training/CE taking place or needed. Keep the individual's online status updated. Example letters/emails located in the Reference section.

- #1 Applicant: NEW Applicant ONLY – Certification Completed
- #2 Applicant: Denial of Applicant – Consult with district and state staff before sending.
- #3 Enrollment: Certification/Enrollment Incomplete – Sent to volunteers who have not completed one or more of the necessary steps in the enrollment process.
- #4 Enrollment: Final Notice Certification Process Incomplete – Sent to individuals who have not completed certification/enrollment in a timely manner.
- #5 Recognition: Annual Continuing Education Requirements Completed – Sent to volunteers who have completed the required number of continuing education credits.
- #6 Recognition: Continuing Education Reminder – Half or three-quarters of the way through the program year send to those needing CE credits.
- #7 Recognition: Continuing Education not Completed – Sent after July 1 deadline.

The following tables are a guide to keep both the volunteer and Extension personnel on task.

## Volunteer – Timeline Certified/Re-certified/Re-enrollment

NEW VOLUNTEER CERTIFICATION	RE CERTIFICATION PROCESS	ADULT RE ENROLLMENT ONLY <i>NOT TO BE CONFUSED WITH CERTIFICATION PROCESS</i>
<b>ENROLL ANY TIME PRIOR TO JUNE 1.</b> <i>[There must be adequate time to complete the ENTIRE certification process prior to July 1.]</i>	<b>RE-ENROLL AND COMPLETE ALL NECESSARY REQUIREMENTS NO LATER THAN DECEMBER 1</b>	<b>RE-ENROLL AND COMPLETE ALL NECESSARY REQUIREMENTS NO LATER THAN DECEMBER 1</b>
<ul style="list-style-type: none"> <li>Enrollment submitted by the volunteer online.</li> </ul>	<ul style="list-style-type: none"> <li>Volunteer re-enrolls online.</li> </ul>	<ul style="list-style-type: none"> <li>Volunteer re-enrolls online.</li> </ul>
<i>Extension personnel will DELETE/CANCEL any InProgress “new” enrollment after 30 days having adequately communicated with the person the need to complete the enrollment. Keep documentation.</i>	<i>Extension personnel will ROLLBACK/CANCEL any InProgress enrollment after 30 days having adequately communicated with the person the need to complete the enrollment. Keep documentation.</i>	<i>Extension personnel will ROLLBACK/CANCEL any InProgress enrollment after 30 days once having adequately communicated with the person the need to complete the enrollment. Keep documentation.</i>
<b>WITHIN 60-80 DAYS OF ENROLLMENT BEING SUBMITTED OR SOONER</b>	<b>WITHIN 60-80 DAYS OF ENROLLMENT BEING SUBMITTED OR SOONER</b>	<b>WITHIN 60-80 DAYS OF ENROLLMENT BEING SUBMITTED OR SOONER</b>
<ul style="list-style-type: none"> <li>Volunteer Orientation(s) completed.</li> <li>WWM completed.</li> <li>OCES Civil Rights for Volunteers completed.</li> </ul>	<ul style="list-style-type: none"> <li>WWM completed.</li> <li>OCES Civil Rights for Volunteers completed.</li> </ul>	<ul style="list-style-type: none"> <li>WWM completed.</li> <li>OCES Civil Rights for Volunteers completed.</li> </ul>
<b>WITHIN 60-90 DAYS OF ENROLLMENT BEING SUBMITTED OR SOONER</b>	<b>WITHIN 60-80 DAYS OF ENROLLMENT BEING SUBMITTED OR SOONER</b>	<b>BREAK IN SERVICE ONLY - WITHIN FIRST 30 DAYS OF ENROLLMENT BEING SUBMITTED OR SOONER</b>
<ul style="list-style-type: none"> <li>Once the above requirements are completed and entered by staff, an invitation to complete background check received.</li> <li>Background check completed.</li> </ul>	<ul style="list-style-type: none"> <li>Invitation for Background check received.</li> <li>Background check completed.</li> </ul>	<ul style="list-style-type: none"> <li><b>VOLUNTEER WITH BREAK IN SERVICE</b> – Back ground check may have to re-initiated.</li> </ul>
<b>AT 90 DAYS OR SOONER</b>	<b>DECEMBER 1 OR SOONER</b>	<b>DECEMBER 1 OR SOONER</b>
<ul style="list-style-type: none"> <li>Volunteer receives letter/email that they are fully certified with all rights and responsibilities (example letter/email; #1)</li> <li>As needed, volunteer receives letter/email that application denied (example letter/email #2)</li> </ul>	<ul style="list-style-type: none"> <li>Fully re-certified with all rights and responsibilities</li> <li>Volunteers not in Active status as of December 1 receives written notification they are not to work with youth without direct supervision.</li> </ul>	<ul style="list-style-type: none"> <li>Volunteers not in Active status as of December 1 receives written notification they are not to work with youth without direct supervision.</li> </ul>
<i>As needed, volunteer may receive letter/email example #3 “Volunteers with Certification/Enrollment Incomplete” and/or #4 “Final Notification Enrollment Incomplete”</i>		
<b>JULY 1 OR SOONER</b>	<b>JULY 1 OR SOONER</b>	<b>BY JULY 1 OR SOONER</b>
<ul style="list-style-type: none"> <li>Remaining 3 Continuing Educations completed.</li> <li>Club/Cloverbud Leader - Annual assessment completed with staff.</li> </ul>	<ul style="list-style-type: none"> <li>Remaining 4 Continuing Educations completed.</li> <li>Club/Cloverbud Leader - Annual assessment completed with staff.</li> </ul>	<ul style="list-style-type: none"> <li>Remaining 4 Continuing Educations completed</li> <li>Club/Cloverbud Leader - Annual assessment completed with staff.</li> </ul>

## County Staff – Timeline Certified/Re-certified/Re-enrollment

NEW VOLUNTEER CERTIFICATION PROCESS SUMMARY	RE CERTIFICATION PROCESS SUMMARY	ADULT RE ENROLLMENT ONLY <small>NOT TO BE CONFUSED WITH CERTIFICATION PROCESS</small>
<i>If at the end of 90 days enrollment is not complete, Extension personnel will change enrollment status to CANCEL/DELETE/INELIGIBLE. Keep documentation/communications with the individual's profile. See Example Letter/Emails #2, #3 and/or #4 in Resource Tools.</i>	<i>If all re-enrollment requirements are not complete by December 1, Extension personnel will change enrollment status to INACTIVE/CANCELED/PENDING. Keep documentation/communications with the individual's profile. See example letter/email #3 and #4 in Resource Tools.</i>	<i>If all re-enrollment requirements are not complete by December 1, Extension personnel will change enrollment status to INACTIVE/CANCELED/PENDING. Keep documentation/communications with the individual's profile. See example letter/email #3 and #4 in Resource Tools.</i>
<b>Volunteer cannot work with youth unsupervised until they have been fully certified and reflect an "Active" status in enrollment system.</b>	<b>The volunteer cannot work with youth unsupervised, chaperone, transport, etc. on behalf of 4-H after December 1 if not re-certified and enrollment reflects an "Active" status. This includes club/cloverbud leaders.</b>	<b>The volunteer cannot work with youth unsupervised, chaperone, transport, etc. on behalf of 4-H after December 1 if not re-certified and enrollment reflects an "Active" status. This includes club/cloverbud leaders.</b>
<b>WITHIN THE FIRST 30 DAYS OF ENROLLMENT OR SOONER</b>	<b>WITHIN THE FIRST 30 DAYS OF ENROLLMENT OR SOONER</b>	<b>WITHIN FIRST 30 DAYS OF ENROLLMENT OR SOONER</b>
<ul style="list-style-type: none"> <li>Review enrollment waivers. Enter date reviewed online.</li> <li>Initiate VAC for processing local screening/interview, reference checks, etc.</li> <li>Send applicant written communication about completing the certification process (example letter/email #3)</li> </ul>	<ul style="list-style-type: none"> <li>Review enrollment waivers. Enter date reviewed online.</li> </ul>	<ul style="list-style-type: none"> <li>Review enrollment waivers. Enter date reviewed online.</li> </ul>
<b>WITHIN THE SECOND 30-80 DAYS OR SOONER</b>	<b>WITHIN THE SECOND 30-80 DAYS OR SOONER</b>	<b>WITHIN THE SECOND 30-80 DAYS OR SOONER</b>
<ul style="list-style-type: none"> <li>New Volunteer Orientation completed.</li> <li>WWM completed.</li> <li>OCES Civil Rights for Volunteers completed.</li> <li>Staff record dates online and upload supporting documentation to profile.</li> </ul>	<ul style="list-style-type: none"> <li>WWM completed and recorded online.</li> <li>OCES Civil Rights for Volunteers completed and recorded online.</li> <li>Initiate background check invitation in Sterling Volunteer, after all above requirements completed.</li> <li>As needed, send example letter/email #3 to volunteer.</li> </ul>	<ul style="list-style-type: none"> <li>WWM completed and recorded online.</li> <li>OCES Civil Rights for Volunteers completed and recorded online.</li> <li><b>VOLUNTEER WITH BREAK IN SERVICE</b> – This applies to certified volunteers who were not enrolled the previous year. Contact the state office to determine whether another background check is needed</li> </ul>

<b>WITHIN THE FINAL 30 DAYS OR SOONER</b>	<b>NO LATER THAN DECEMBER 1</b>	<b>DECEMBER 1 OR SOONER</b>
<ul style="list-style-type: none"> <li>Initiate background check invitation in Sterling Volunteer, <b>after</b> all above requirements completed.</li> <li>Once volunteer is in “Active” status send letter/email notifying them they are certified with all rights and responsibilities (example letter/email #1)</li> <li>Upload ALL documentation (letter/email #1, VAC materials, sign-in sheet(s), interview notes, reference check, etc.) in data management system to profile.</li> </ul>	<ul style="list-style-type: none"> <li>Enrollment reflects “Active.”</li> <li>As needed, send example letter/email #4 informing volunteer they must be supervised in the presence of youth.</li> </ul>	<ul style="list-style-type: none"> <li>Enrollment reflects “Active.”</li> <li>As needed, send example letter/email #4 informing volunteer they must be supervised in the presence of youth.</li> </ul>
<b>HALF TO THREE-QUARTERS OF THE WAY THROUGH THE PROGRAM YEAR</b>		
As needed, send timely continuing education reminder(s) to volunteers (example letter/email #6)		
<b>NO LATER THAN JULY 1</b>	<b>NO LATER THAN JULY 1</b>	<b>NO LATER THAN JULY 1</b>
<ul style="list-style-type: none"> <li>Remaining three Continuing Educations completed and recorded online.</li> <li>Send volunteer written communication regarding 1) All CE requirements completed letter/email example #5 or 2) CE incomplete letter/email example #7. Upload communications (letters/emails) to the individual’s profile.</li> <li>Club/Cloverbud Leader annual assessment completed and uploaded to their profile.</li> </ul>	<ul style="list-style-type: none"> <li>Four Continuing Educations completed and recorded.</li> <li>Send volunteer written communication regarding 1) All CE requirements completed letter/email example #5 or 2) CE incomplete letter/email example #7. Upload communications (letters/emails) to the individual’s profile.</li> <li>Club/Cloverbud Leader annual assessment completed and uploaded online.</li> </ul>	<ul style="list-style-type: none"> <li>Four Continuing Educations completed and recorded.</li> <li>Send volunteer written communication regarding 1) All CE requirements completed letter/email example #5 or 2) CE incomplete letter/email example #7. Upload communications (letters/emails) to the individual’s profile.</li> <li>Club/Cloverbud Leader annual assessment completed and uploaded online.</li> </ul>



## What to Look/Listen for when Selecting and Placing a Volunteer

Rarely will a volunteer manager have “perfect” applicants for 4-H volunteer positions. Because of this it is important to find balance in the strengths and weaknesses of the applicants, to know when someone is teachable or when an identified risk is unacceptable for the organization.

Recruit and screen for retention. Sell the individual on the “service” they will be providing, and the “personal” fulfillment gained from serving the 4-H Youth Development effort. Time and resources will be invested in educating the volunteer, so we want efforts to pay long-term dividends for the youth, the individual, and 4-H program.

## What an Application Communicates

The information provided in an application provides a consistent foundation for screening individuals. Application provides (2020):

**Identification** – Individual’s legal name, as well as “home” address(s).

**Convictions** – Voluntary disclosure which will be referenced if a background check reveals a history requiring consideration for eligibility.

**Waiver/Consent** – The content of each waiver/consent is informing the volunteer of the organization’s position, guidelines, procedures, and expectations of the University, Extension, and 4-H. As of 2020, volunteers are informed, they are entering an electronic signature and/or answer in the data management system. No one other than the volunteer can enter a signature on their behalf.

**Signature and Date** - No one other than the volunteer can enter a signature on their behalf.

## What to Look for when Interviewing or checking References?

Screening through interviews and/or references assists in placing volunteers in positions that will be a good fit for both the 4-H organization and the individual. It is a win-win situation for both parties. See resources in the Forms sections which can be useful in conducting interview and reference checks.

Formal or informal interviews are the first step in developing relationships with our volunteers and having an “informed” volunteer base.

**Best Practice** – Because of the level of responsibility and expectations, conduct formal interviews with those applying to be a Club/Cloverbud Leader.

### Forms:

- Reference Form
- Reference Form for Phone or Face-to-Face Interview
- Applicant Interview Form

Some counties will choose to ask for references. References should be individuals who have known/worked with the person and can speak about the qualities the volunteer brings to the position (i.e., working with youth or volunteers,



teaching, etc.). References should not be relatives.

Keep notes and upload all documentation in the individual's online profile.

Applicants who clearly do not have qualifications appropriate for serving as a 4-H volunteer should be thanked for their interest and notified that you were unable to place them. Do not make any accusatory statements or explain why the application was denied. Work closely with district and state staff in these situations.

There are several indicators, which can point toward potential problems. It will be the responsibility of the Volunteer Manager and the Volunteer Advisory Committee (VAC) to identify and determine whether factors merit qualification or disqualification. The *Staff Screening Tool Kit: Building a Strong Foundation through Careful Staffing* (2004) suggests looking for the following:

- **Have there been frequent, unexplained moves?** People who move a lot without explanation may have a record of debt, criminal activity, or child abuse.
- **Are there gaps in employment?** Unexplained changes and gaps in employment can indicate poor work habits, terminations or employers who would provide poor references. These gaps could also indicate imprisonment or institutionalization.
- **Are any criminal convictions or serious motor vehicle violations listed?** Any convictions should be examined in terms of the position requirements. It would be prudent to determine whether the information implies a lack of judgment or maturity.
- **What are the applicant's avocations (for example hobbies, or community interests)?** Involvement in age-appropriate hobbies and community activities suggests emotional maturity. An over investment in children's activities to the exclusion of social activities with adults may indicate an unhealthy compulsion to be around children.

Additional Resources:

**The Staff Screening Notebook: 10 Steps to quality staffing** <http://www.nonprofitrisk.org> (2023)

**AmeriCorp**; officially the Corporation for National and Community Service (CNCS) is an independent agency of the United States government that engages a variety of stipend volunteer work program. <https://americorps.gov/> (2023) There are a variety of resources available to those managing volunteers.

The *Staff Screening Tool Kit: Building a Strong Foundation through Careful Staffing* (2004) suggests asking the following questions when screening for specific risk factors.

*When questionable information appears in an application or is revealed in an interview it is important to screen the volunteer based on the position for which they are being recruited.* Individuals who are not qualified and cannot perform the necessary task can quickly be eliminated from consideration or guided toward a more appropriate role.

Nonprofit organizations should consider three factors as they develop a policy for responding to adverse information found through the screening process: consistency of information, context, and position requirements.

**Consistency of Information.** Information from the applicant, references, and record checks should be consistent.

**Context.** Ask the following questions in determining whether an individual reporting adverse information is an acceptable risk. How long ago was the incident? What has the individual been doing with his or her life since the incident? What was happening in the individual's life when the incident occurred? Checking references will verify whether current lifestyle may justify placement.

**Position Requirements.** It is important to assess the relevance of the adverse information to the requirements of the position description. For instance, if someone is working in an office filing records, a driving record would be irrelevant. An individual with a record of embezzlement, forgery, or robbery would not be an appropriate risk where funds or financial records could be handled. An individual with a record for child molestation/abuse could be considered an unwarranted risk for working with children. (Patterson, 1998)

Source: Patterson, J.C. Staff Screening Tool Kit: Building a Strong Foundation Through Careful Staffing. Nonprofit Risk Management Center, Washington D.C., 1998, pages 30-31.

## Before, During and After the Interview

Because of the sensitive nature of conducting an interview (reference check or the potential volunteer) staff and VAC members must be aware of laws protecting the applicant. Since 4-H is part of the University and a government agency we must be in compliance when conducting reference checks and interviewing potential volunteers.

The interview should be a relaxed conversation where people learn about each other (skills and interests) and the 4-H organization. An interviewer needs to practice active listening. This process assists in identifying the volunteers who **will** and **will not** be good role models for youth. It also helps determine where the applicant needs additional education and/or training.

**Prepare** - Preparation is essential to representing the 4-H program in a positive light and communicating a level of professionalism. Preparation will include:

- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>• Keeping the applicant informed that the process is proceeding by communicating in a timely manner the date, time, and location of the interview. Be sure the location is free of interruptions.</li><li>• Prepare a list of questions – General questions related to the applicant's ability to do the volunteer work, questions specific to the individual's application and experience and questions related to the</li></ul> | <ul style="list-style-type: none"><li>actual job to be performed (position description).</li><li>• Organize thoughts and questions to maximize time with the applicant.</li><li>• Determine what information might need to be prepared and provided during the interview.</li><li>• Review the dos and don'ts of interviewing.</li></ul> |
|---|--|

## During the Interview

The interview environment and the interviewer's attire should reflect professionalism.

- Conduct a professional interview. 4-H is being examined just as much as the applicant in this formal process.
- Welcome the individual with a handshake and warm tone of voice. Help the individual feel comfortable and at ease. Begin informally and establish rapport. "Tell me a little about yourself."
- Follow the line of questions prepared in advance ensuring the interview questions and scenarios are legal and appropriate. Give the applicant time to answer questions. Be flexible to the tone and atmosphere of the interview.
- Listen carefully, assess the applicant's abilities, interests, and commitment. Record thoughts, impressions, and responses on the "Interview Form" for future reference.
- Be straightforward about expectations and requirements to serve as a certified volunteer in Oklahoma (for example: duties, skills, qualification, and experiences needed, working relationships with others, authority and accountability, benefits, training, and resources available and time required). Be honest to insure long-term retention.
- Encourage applicant questions.
- As necessary, suggest other positions which may be suitable or of interest.
- Leave the door open for either the applicant or the organization to decide later. Ask them if they are still interested in serving as a volunteer.
- Close the interview by telling the applicant what the next step will be. End on a positive note! Thank the applicant for his/her time and interest.

## After the Interview

As soon as possible:

- Summarize interview notes immediately following the interview.
- In cooperation with fellow VAC member(s) answer the following statements about observations and information heard:
  - Ability to listen attentively and hear accurately.
  - Experience as a volunteer
  - Knowledge of volunteer positions available
  - Ability to speak clearly and explain things
  - Capacity to recognize individual strengths and potential.
  - Interested in serving the 4-H organization and supporting our mission and objectives.
  - Experience in working with people of varied racial, religious, education, economic, etc. backgrounds.
  - Any indicators of potential risks or concerns?
  - Does the individual need educating/train for their role?
  - Special skills or talents the volunteer will bring to the program.
- Does the VAC agree that the individual is an appropriate fit for the 4-H program and position?
- Send the individual a thank you letter/email for their time.

## An Effective Interviewer

### Use active listening

Active listening is accomplished when one party really concentrates on what another is saying and asks open probes to get the speaker to open and talk more. The listener does not offer empathy by relating what the speaker is saying to some other experience the listener has had, no matter how similar it is. The active listener also does not offer solutions or try to solve the problem or situation the speaker is talking about. The only goal of the listener is to get more information on the specific topic of conversation from the speaker.

### PRACTICES FAVORABLE QUALITIES

- Prepared – You are a representative reflective of the 4-H program.
- Familiarity with the programs and the organization
- Honest and straight forward with the applicant, no surprises later.
- Ability to converse easily with strangers.
- Ability to efficiently guide the conversation without sacrificing sensitivity or purpose.
- Skill in observing or sensing other people's reactions, attitudes, concerns, personality traits and backgrounds.
- Acceptance of all people

### AVOIDS COMMON ERRORS

- Asking questions which have an obvious, preferred answer.
- Making decisions too early in the interview
- Following a stereotype pattern of interviewing without recognition of individual differences
- Lacking knowledge or ability to explain the job expectations and requirements.
- Letting pressure of duties shorten the interview time or rush the applicant.
- Doing more talking than listening
- Failing to direct the interview and thereby wasting time.
- Not knowing what to look for
- Tending to be overly influenced by individual factors such as personal traits rather than considering the person as a whole.
- Lacking skill in asking questions or probing more in-depth staying within the scope of the law
- Failing to describe the job and organization in sufficient detail.
- Tending to be too routine instead of adapting each interview to the individual
- Being interviewed by the candidate instead of leading the interview

*Being the Interviewer* was adapted from *The Effective Management of Volunteer Programs*, by Marlene Wilson (Boulder: Volunteer Management Associates, 1976), p. 123.

## Ask the Right Question

Developed by Liz Scott, Ottawa County, Michigan Cooperative Extension 4-H Youth Agent, 1993.

Avoid questions requiring one-word responses. Use “open” probes to gather information. An open probe shows interest in what the person has said and encourages the person to talk more. An open probe can be done by simply nodding the head in agreement and then raising an eyebrow in a questioning manner. The probe asks for more information and signals to the speaker that you are listening and that you want to hear more.

### Open probes consist of phrases like:

- Tell me more.
- Oh?
- Can you be more specific, please?
- Why do you think (say) that?
- Really?
- That's interesting.
- What is your plan?
- Explain what you mean by...
- What would happen if . . .
- What do you think about that?
- Can you give me an example?
- Would you go into more detail about that?
- I'd really like to know more about that.

Closed “probes” are statements or questions that bring the topic of conversation to a close. They usually are questions with one-word answers, often “yes” or “no.” Closed probes do not get a lot of information from people and do not stimulate them to talk more.

### Closed probes consist of phrases like:

- Did that make you happy?
- Where do you work?
- Have your children been in 4-H?
- Do you have a plan?
- When did that happen?
- Are you supportive of...?
- That was good!
- I've heard what I wanted/needed to hear.
- This happened in what year?
- Did you accomplish your goal?
- Did you ever...?
- Do you do too much?

## Questions to Avoid

Any question that overtly draws a distinction or appears to be an attempt to gather information on race, color, national origin, genetic information, gender, age, sexual orientation, gender identity, religion, disability, or status as a veteran, in any of its policies, practices or procedures is illegal and should NOT be asked. Interview questions must pertain to the applicant’s ability to do a specific job.

Under certain circumstances, the following questions might be considered discriminatory:

- We usually do not place women (men) in this position. How do you think you’ll relate to the clientele?
- How does your spouse feel about this type of position?
- Are you married?
- Do you have plans to start a family?
- How many children do you have?
- What are the ages of your children?
- What are your childcare arrangements?
- We know you have elderly parents. How do you plan to take care of them?

- Do you own or rent your home?
- What is your birth date?
- When did you complete elementary or high school?
- Where were you born?
- What language is commonly used in your home?
- Does your religion prevent you from working on weekends or holidays?

- Where do you go to church?
- Have you ever served in a foreign military?
- What is your credit rating?
- What clubs, groups, church/synagogue/mosque or lodges do you belong to?

## Personnel Files For Volunteers

Beginning fall 2017 all-volunteer records will be housed electronically within the individual's profile in the online data management system being employed by Extension and/or 4-H. Paperwork (reference check, interview forms, etc.) and correspondence will be scanned and uploaded into the designated profile.

### Items managed in a profile:

- Interview notes
- Reference check notes/forms
- VAC minutes, notes, approvals, etc.
- Correspondence – letters and/or emails
- Documentation continuing education/training completed.
- Volunteer Assessment/Personnel Action

### Items not necessary:

- Copies of certificates of recognition

Oklahoma 4-H Youth Development  
recognizes

\_\_\_\_\_

has successfully completed the training and requirements to be recognized as a certified 4-H Volunteer and has agreed to accept the duties and responsibilities necessary to partner with the Oklahoma 4-H Youth Development program.



**Oklahoma 4-H  
Certified Volunteer**

18 USC 707

 OSU EXTENSION  
4-H YOUTH DEVELOPMENT


County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_  
County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_

Updated 3/2023

Oklahoma 4-H Youth Development  
recognizes

\_\_\_\_\_

has successfully completed \_\_\_\_\_ units in continuing educations, and an annual review of the University's Working with Minors and Title VI, VII & IX policy in \_\_\_\_\_ County.



OSU EXTENSION  
4-H YOUTH DEVELOPMENT

**Annual renewal of  
4-H Volunteer Certification**

County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_  
County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_

Updated 3/2023

Oklahoma 4-H Volunteer Management System

**I.S.O.T.U.R.E. Model**

# Orientation



I Identify: Identifying volunteer opportunities within the organization and developing appropriate written position descriptions for them.

S Select: Recruiting and selecting the volunteers best qualified (appropriate knowledge, attitudes and skills) for the volunteer opportunity. Selection includes the screening process.

**O Orient: Orienting selected volunteers to the role expectations of the volunteer position and organization.**

T Train: Stimulating and supporting volunteer efforts to acquire knowledge and to develop attitudes and skills that will improve the quality of their performance in volunteer positions.

U Utilize: Providing opportunities for volunteers to use acquired knowledge and skills appropriately, for the overall growth and success of the organization.

R Recognize: Recognizing and rewarding volunteers for the positive contributions they make to the organization.

E Evaluate: Evaluating and providing professional feedback as to the individual's performance and continued growth as a volunteer.



## Orientation for New Volunteers

At this point in the ISOTURE model, the Volunteer Manager has made sure that a volunteer comes to the organization with the right qualification and enthusiasm, and willingness to do a good job. But don't expect them to come with the specific knowledge and skills need to serve the Oklahoma 4-H Youth Development efforts. Even those with a 4-H background will need education, training and possibly re-training.

Orientation is the first step in informing volunteers of the job(s) to be encountered while serving 4-H. As a volunteer maintains their affiliation with 4-H over a period of time the Extension educator's role will shift from trainer to teacher, then coach and mentor.

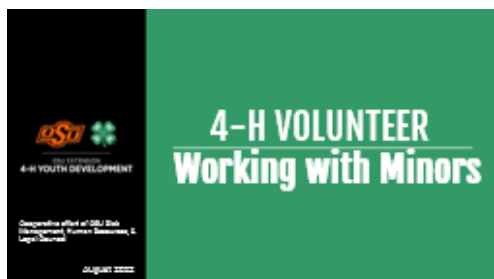
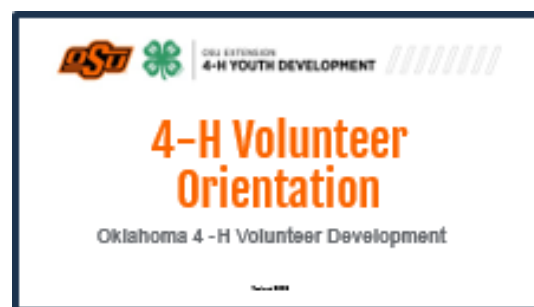
There are three (11/2023) required orientations/introductions which must be completed before a volunteer is certified. Do not try to do all three trainings at the same time. It will be too overwhelming for the recruit.

Each slide-deck with notes is available to the Extension educator for conducting the Introduction to 4-H and Working with Minors (WWM). As of 2023 the OCES Civil Rights and Diversity for Volunteers is presented as a video. The WWM and Civil Rights presentation can be presented in person or viewed online. In the event any one introduction is conducted one-on-one the same information must be discussed with the volunteer.

Before conducting any session (i.e., August 1) **be sure a volunteer is participating in the latest orientation(s) required by Extension and/or the 4-H Program.**

The *4-H Volunteer Orientation* (revised 2023) is designed as an overview of 4-H Youth Development for new volunteers and those being re-certified. The orientation will last 1-2 hours. Be upfront and honest about the program and expectation. If an orientation is conducted one-one, the same information is to be presented.

**4-H Volunteer Orientation** - PPT with notes is located at <http://4h.okstate.edu/for-educators/volunteer-management-system/>. (revised 2023) All counties are to use the primary information provided in the orientation. Opportunities have been built into the presentation for localizing information. A county will need to personalize designated slides and content prior to conducting the orientation.



**Working with Minors** – the presentation with notes is located at <http://4h.okstate.edu/for-educators/volunteer-management-system/>. (revised 2022) Annually all volunteers must view online through the designated/sanctioned platform or with the county educator. Be sure volunteers are receiving the most recent version.



Beginning in the fall of 2023 all volunteers must annually view the recording of the **OCES Civil Rights Diversity training for Volunteers** either online through the designated/sanctioned platform or with the county educator. Be sure volunteers are receiving the most recent version.

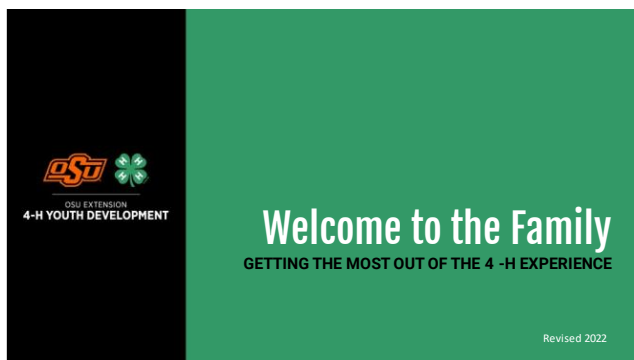
## CIVIL RIGHTS DIVERSITY TRAINING

*for Staff, Volunteers and  
Advisory Committees*



## Other Introductions/Orientations and Continuing Education Slide Decks

Other materials developed for orienting club leaders and 4-H families/parents.



An introduction for new families and parents – Slide deck and teaching outline for use by county educator, club leader or volunteer. <http://4h.okstate.edu/for-educators/club-management-system/club-leader-fall-orientation-meeting> (revised 2022).

Slide deck and teaching outline for County Educator conducting "back to school" or "beginning of the year" meeting for club leaders. <http://4h.okstate.edu/for-educators/club-management-system/club-leader-fall-orientation-meeting> (revised 2022)



Links to other supporting resources (last updated 2023):

- [Resources for Club Meetings](#) - club officer guides, parli-pro information, officers, etc.
- [Volunteer Development Fact Sheets](#)
- [4-H On TRAC](#) - resources and forms
- [Volunteer Position Description and Agreement](#)



Oklahoma 4-H Volunteer Management System  
**I.S.O.T.U.R.E. Model**

# Train



- I Identify: Identifying volunteer opportunities within the organization and developing appropriate written position descriptions for them.
- S Select: Recruiting and selecting the volunteers best qualified (appropriate knowledge, attitudes and skills) for the volunteer opportunity. Selection includes the screening process.
- O Orient: Orienting selected volunteers to the role expectations of the volunteer position and organization.
- T Train: Stimulating and supporting volunteer efforts to acquire knowledge and to develop attitudes and skills that will improve the quality of their performance in volunteer positions.**
- U Utilize: Providing opportunities for volunteers to use acquired knowledge and skills appropriately, for the overall growth and success of the organization.
- R Recognize: Recognizing and rewarding volunteers for the positive contributions they make to the organization.
- E Evaluate: Evaluating and providing professional feedback as to the individual's performance and continued growth as a volunteer.

# Continuing Education



Continuing education meets the needs of all volunteers. It provides the means for continued intellectual growth, acquiring new information, improving skills, preparing for additional responsibility, being engaged in teaching others, adapting to change, understanding the vital connection of context and content in youth development, and preventing burnout.

Think creatively about the continuing education needs of your volunteers. Ask what their interests are. Talk with other county Extension educators about their clientele needs. When there are similarities, plan in-service/CE/training together or share programs across county lines.

Review ***Century III: A Model for Oklahoma 4-H***

- ✿ Chapter 1 – Adult Volunteer Development and Continuing Education.
- ✿ Chapter 2 – Reaching and Teaching through county 4-H Program, including Adults as learners
- ✿ Chapter 3 Volunteer Development – Education

Reference ***Oklahoma 4-H Volunteer Core Competencies***  
Units 1-3 for volunteer CE  
“contextual” lessons to blend with subject content.

Counties are encouraged to establish a consistent pattern and schedule for continuing education, just as we encourage club leaders to establish and maintain patterns with their club members. The schedule should be prepared and available at the time of enrollment each fall. Market the training to 4-H parents, episodic volunteers, certified volunteers and other community educators working with youth audiences. (See **Resources** for an Example of a Parent-Volunteer Continuing Education schedule.)

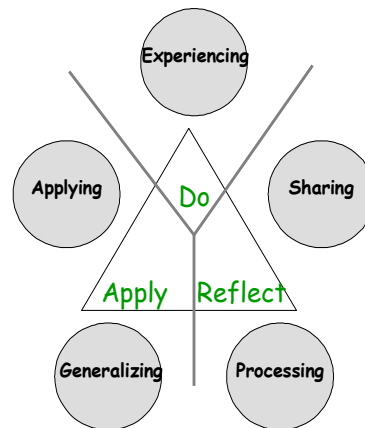
Volunteers will continue to improve and grow through your educational efforts as an instructor, facilitator, coach, and mentor. It is the Extension educator’s responsibility to “continually assess” the work environment, both things and people, to ensure that it enhances productivity. Do all these things with this end in mind: volunteers, along with paid staff, should

stay focused on the goals of the county as well as on the mission of the 4-H organization. *Lee and Catagnus 1999*

Quality training that is organized and well-conducted builds confidence and enhances your credibility. Providing opportunities for group interaction and learning is a more efficient use of your time than one-on-one, and the volunteer benefit from the questions and interaction with their peers.

Design training in an orderly fashion. Start by identifying the specific information or skills that will be taught [CONTEXT]. Explain why it is

**Experiential Learning Model**  
Pfeiffer and Jones 1985



important that they understand and master the information or skill as a volunteer/parent. Then use appropriate activities to teach the information [CONTENT]. Allow sufficient time for the learning exercise. Give the volunteers' time to repeat back what they have learned, explain its future application and be sure to answer their questions. One learns through practice, repetition and application which is referred to as "Learn by Doing." (See 4H.VOL.118 Experiential Learning.)

## Adult Volunteers as Learners

The following summary was prepared by Marilyn Lesmeister PhD, University of Florida, 4-H Youth Development Programs

### Adult Learners have the following general characteristics:

- Adults have a broad base of experience upon which to draw and share with others.
- Adults have many other things going on in their lives: Family, job, community, and social responsibilities.
- Many adults face barriers to learning such as unlearning, unrealistic goals, poor self-image, and diminished vision and hearing.
- Adults may not risk failure in learning situations.
- Adults want information to be relevant to their needs and immediately applicable.
- Adults respond better when the material is presented through a variety of teaching methods and when information is understood through different sensory experiences.

"Despite the existence of divergent teaching styles, a significantly large portion of the adult education literature supports the collaborative model as the most effective and appropriate style for teaching adults...the interest of adults in learning is heightened when they deal with problems directly concerning them and having immediate application. Further, adults have within themselves the capacity to solve their own problems." Gary J. Conti, *Adult Education Quarterly*, Vol 35, #4, Summer, 1985, p.221

### Planning Education for Adult Volunteers:

- Be prepared, learn as much as possible about the topic.
- Always plan several types of learning methods for every educational session.
- Choose methods that will accomplish the necessary learning and be effective for adult learners.
- Choose methods that adults will enjoy.
- Use methods that help learners apply concepts, so they are stimulated to integrate knowledge and ideas into their behavior.
- Initially, choose methods you are comfortable using. Then, experiment with other teaching strategies. You are modeling what you want them to do in their programming.

### How Do People Learn?

20% Reading it  
20% Hearing It  
30% Seeing It  
50% Hearing and Seeing It  
70% Saying It  
90% Doing It

Depending on professional training, 4-H experience, and time in the county you likely will not have all the answers. Below are some simple tips for dealing with the “adult learners” questions:

- Relax
- Listen to what is really being asked. Function as a facilitator.
- Pass the question back to the learner “What do you think?”
- Invite all learners to make suggestions.
- Offer to find the answer and get back with the individual or group. It is better to have no response or no answer than to share the wrong information.

## Number of Continuing Education Credits

Extension educators should annually provide at least four volunteer continuing education/training sessions at the county level. Training should be a blend of Oklahoma 4-H Volunteer Core Competency Curriculum [program delivery context] and subject matter [content] to effectively provide quality experience (blend information and activity).

Renewing Working with Minors and OCES Civil Rights and Diversity for Volunteers do not qualify as continuing education. These programs are a review of university policy and expectations.

**Who dares to teach must never cease to learn.**

*John Cotton Dana*

## What Qualifies as Continuing Education Credit

Training at the county/unit level with the OCES professional(s) is important in establishing credibility and a relationship between the volunteer and Extension educator. At-least two of the four continuing education credits must be at the county/unit level with their OCES professional(s).

Continuing Education for volunteers should emulate the use of the 4-H Experiential Learning Model, Life Skills Model and Recognition Model. To effectively use these models in the presentation of “subject matter,” it is essential that adequate time (recommend 1-2 hour(s)) is allowed for valuable group processing. Through group processing the volunteer “reflects and applies” the information to their role and gains a more effective understanding of how to use each of the models in positive youth development.

The other two volunteer CE opportunities may take place at the

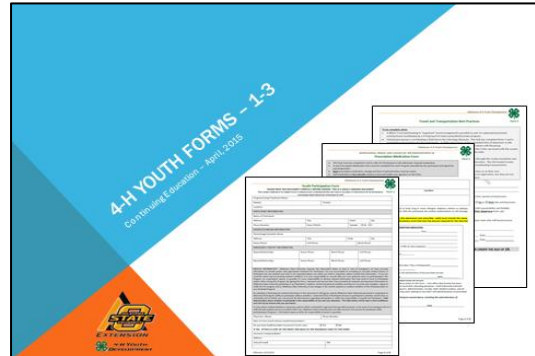
- County, district, state, or regional level,
- On-line CE,
- Professional development related to youth work and/or
- Subject matter relevant to the individual’s position in the 4-H program.

*If you want to feed people for a day, give them a fish. If you want to feed them for a lifetime, teach them to fish. If you want people to remain dependent upon you, teach them one fact at a time. If you want people to learn for a lifetime help them learn how to learn.*  
~Adapted by Bill Lowthert

The volunteer must provide documentation to the county Extension office so it can be recorded in the individual’s profile.

Participation in a PVA business meeting does not qualify as Continuing Education. Training held in conjunction with the business meeting needs to closely follow the “time” guidelines

for continuing education. Brief fifteen-thirty-minute sessions over a period of months are not recorded as continuing education. If two consecutive thirty-minute sessions complete a single lesson, then that can be recorded as a CEU.



A sample of 4-H Volunteer Core Competency and Risk Management Trainings available for volunteer development.

## Maintaining Certification

Annually volunteers need to participate in four (4) continuing education/trainings.

A new volunteer is required to complete three (3) in their initial year of enrollment.

In 2014 Working with Minors (WWM) was made mandatory by the University. In 2023 OCES Civil Rights and Diversity for Volunteers was made mandatory for all Extension volunteers.


All continuing education is recorded in the online data management system associated with the volunteer's profile.

The Extension educator should recognize volunteers who maintain their certification status each year. See the chapter on "Recognition." See "Resources" for an example letter/email # 5, #6, and #7.

Volunteers who do not complete the required training need to receive communications about not fulfilling the expectation. They may need to be placed on probation. Probation is covered in the chapter on "Evaluation." See "Resources" for an example letter/email #6 and #7.

Oklahoma 4-H Youth Development  
recognizes

\_\_\_\_\_ has successfully completed \_\_\_\_\_ units in continuing educations, and an annual review of the University's Working with Minors and Title VI, VII & IX policy in \_\_\_\_\_ County.



OSU EXTENSION  
4-H YOUTH DEVELOPMENT

**Annual renewal of  
4-H Volunteer Certification**

County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_  
County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_

Updated 3/2023

Oklahoma 4-H Youth Development  
recognizes

\_\_\_\_\_ has successfully completed the training and requirements to be recognized as a certified 4-H Volunteer and has agreed to accept the duties and responsibilities necessary to partner with the Oklahoma 4-H Youth Development program.



18 USC 707

**Oklahoma 4-H  
Certified Volunteer**



OSU EXTENSION  
4-H YOUTH DEVELOPMENT

County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_  
County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_

Updated 3/2023



Oklahoma 4-H Volunteer Management System  
I.S.O.T.U.R.E. Model

# Utilize



- I Identify: Identifying volunteer opportunities within the organization and developing appropriate written position descriptions for them.
- S Select: Recruiting and selecting the volunteers best qualified (appropriate knowledge, attitudes, and skills) for the volunteer opportunity. Selection includes the screening process.
- O Orient: Orienting selected volunteers to the role expectations of the volunteer position and organization.
- T Train: Stimulating and supporting volunteer efforts to acquire knowledge and to develop attitudes and skills that will improve the quality of their performance in volunteer positions.
- U Utilize: Providing opportunities for volunteers to use acquired knowledge and skills appropriately, for the overall growth and success of the organization.**
- R Recognize: Recognizing and rewarding volunteers for the positive contributions they make to the organization.
- E Evaluate: Evaluating and providing professional feedback as to the individual's performance and continued growth as a volunteer.

## Make Use of Volunteers

Volunteers are a rich source of knowledge and experience. The potential “skills” of volunteers usually exceed that of which any Extension educator can personally provide. A community of informed and trained volunteers can make better decisions than an Extension educator would make alone. Increased program ownership builds a firm base of support for 4-H that will endure changes in Extension staff, local officials and other economic or political shifts.



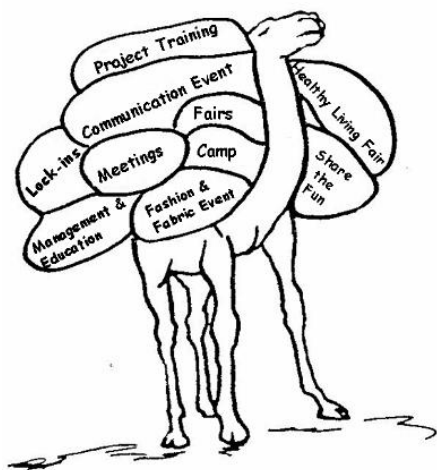
In chapter 3 of **4-H Century III: A Model for Oklahoma 4-H**, *Developing a Model Leadership Structure* the focuses is placed on developing people and skills and then placing the individuals where they best serve them self and the program.

As a professional, volunteers are not to be viewed as objects, as numbers or even just as a warm body filling a position. Volunteers are a key component in the delivery system for OCES/4-H educational programs. Each year thousands of individuals volunteer their time, talents, and services to assist paid staff in the development and delivery of Extension programs. Others assist our marketing efforts, as advocates and spokespersons for the organization with elected officials and within a community network.

## Empowering Volunteers

Empowering volunteers does not imply the absence of Extension educator involvement in a county program. In fact, as volunteers are given the support, attention, and training to manage county programs; the educator’s role shifts from being a programmer, to that of educator, counselor, advisor, mentor and manager for volunteers, clubs, committees, councils/associations/foundations and/or officer teams.

Up until this point the Extension educator has been focused on Volunteer Development in the **ISOTURE** Model, educating and preparing volunteers to assume their roles in our program. In the next step of the **ISOTURE** model the focus is on “utilizing” the volunteer. The professional is now ready to put into practice 4-H Volunteer Middle Management. This is the transfer of leadership and responsibility for the daily tasks of managing 4-H activities and events. (National 4-H Learning Priorities: Volunteerism for the Next Generation, 2010)



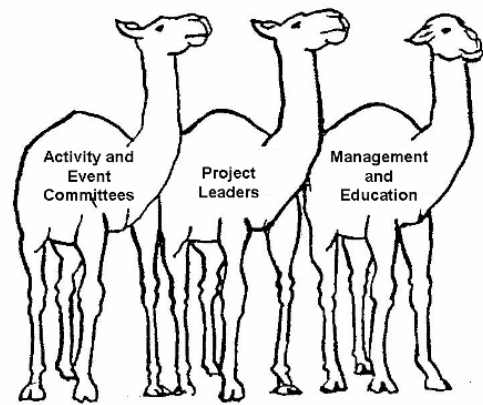
Through the process, a “Volunteer Lead Leadership Model” evolves and broadens the base of shared leadership and responsibility for 4-H programming. As more volunteers assume responsibility for programs, we ultimately reach more youth through growth and expansion. Extension educators and adult volunteers who share the decision-making process ultimately produce dedicated 4-H members, families, parents, and volunteers with ownership in the 4-H program.

## Shifting from Educator to Manager

In this stage the Extension educator is shifting from “educator” to Volunteer Management or the practice of organizing processes and systems which will achieve consistent program results through a volunteer lead program. Volunteers will look to and rely on OCES staff for leadership, training, and support as they assume increased leadership roles at the local and county levels. As a volunteer manager, Extension professionals must master the knowledge and skills in volunteer middle management, as well as communicate, negotiate, and provide ongoing education and support in “using” volunteers in expanded roles.

The moment you stop learning, you stop leading. ~ Rick Warren

As an “educator” and “manager” the largest percentage of a professional’s time will be educating/training and advising teams of volunteers who have assumed responsibility and ownership in *their* 4-H program. As an advisor, your role is to see that their decisions follow the philosophies and guiding principles of the 4-H program as the volunteer(s) plan, implement and evaluate *educational* programs/activities/events. When the volunteers plan(s) stray from the 4-H Youth Development mission and philosophies then the Extension professional is responsible for re-focusing them and possibly re-introducing information which will keep programming efforts focused on the 4-H guiding principles and philosophy.



Middle Management = Sharing the Load

## A Plan for Moving forward using Volunteers

If a county currently has slight volunteer involvement, obviously one cannot move quickly from where they are to a “model” volunteer lead structure. This means establishing some short-term goals. There will be temporary setbacks and even frustration, but with fortitude and patience there will be signs of progress.

1. The process begins through Continuing Education opportunities which introduce the leadership principles and concepts of a “volunteer lead” program. Gradual implementation occurs as volunteers are empowered and trusted to carry out assignments. This concept is similar to the Youth-Adult Partnership model volunteers re being encouraged to use in 4-H programming.
2. The second step will be to form a committee (representative of leadership teams, clubs, volunteers, parents, and Extension educator) to draft a *County Leadership Plan* for Middle Management.
3. The final phase occurs when the leadership team is ready to write county goal(s). Goals for progressing toward and committing to a model for “Leadership Management.” Each county’s plan will differ, however all county plans will:
  - Outline long range and yearly goals for developing an effective and constructive leadership structure at the local and county level.

- Provide for significant involvement of youth and volunteers in planning, implementing, and evaluating 4-H programs at the local and county level.
- Clearly define decision-making and other responsibilities of volunteers, committees, and organizations with 4-H volunteer position descriptions.
- Have plan formally accepted by appropriate organizations, committees, and Extension educator(s).
- Be widely distributed and used, to provide focus and guide clubs, parents and volunteers associated with 4-H in the county.

## Protecting the University, Volunteer and the 4-H Program

In the section “Selecting” volunteers, the University’s position and Federal Labor Laws were introduced.

Effective 2015, the University wants volunteers certified and episodic to complete a liability waiver when in the act of volunteering for our program.

A prudent or best management practice is to use the liability waiver (Working with Minors forms 5) accompanied by a position description when there is a 4-H activity or event sponsored by extension/4-H using episodic volunteers.

All certified 4-H volunteers have a generic position description as part of the enrollment process and club/cloverbud leaders have an official position description signed annually as part of the enrollment process. These two items will cover the bulk of the certified volunteer efforts but may not cover volunteering for a “specific duty,” i.e., serving on the county Share the Fun committee which is not part of the job of a club leader or project leader.

Another way to define a person's *scope of responsibility* is through a written letter/email of invitation or a contract. When asking someone to serve on a committee, be a general assistant the day of an activity/event, conduct a workshop, present a program, or judge an event be sure to follow-up the verbal conversation with a written document defining the date, time, location, and other specific details such as what you expect them to do. This type of documentation defines the *scope* for which a person is employed/**utilized** (even if they are doing the task without compensation) as required by the Oklahoma Governmental Tort Claims Act. Refer to pages 18-19.

General **County 4-H Volunteer Position Descriptions** and a template are posted at <http://4h.okstate.edu/for-educators/volunteer-management-system>. (2023) These position descriptions will assist Extension educators in recruiting, training, and using volunteers in the implementation of a *County Leadership Plan* for Middle Management.

## Volunteer Roles or Uses

An Extension educator will manage volunteers serving in individual and county leadership roles. In the Century III and Club Management manuals the following tables summarize the diverse volunteer roles supervised by a Volunteer Manager. Each of these noted resources goes into much greater detail in how to utilize and manage these leadership roles.

### LOCAL 4-H LEADERSHIP DESCRIPTIONS

<b>Members and Families</b>	4-H members and their family are responsible for actively participating in club meetings, committees, and activities. They share their time, talents, and skills with the club.
<b>Organizational Leader/Cloverbud Leaders</b>	These volunteers are the primary contact between the local club and the Extension Office. They coordinate and guide local club programming. A key responsibility is communicating with 4-H members, other local volunteers, the community, and the county Extension staff. Their most important role is to provide educational opportunities and encourage and involve youth, parents, and volunteers in club activities.
<b>Project Leader</b>	Project work is the primary tool used by 4-H to interest youth. Project Leaders provide expertise, experience or simply leadership in project areas as they work with members. Local project groups are encouraged within a community club for small group focused subject matter study. Larger project groups may consider becoming a "Project Club" with an Organizational Leader.
<b>Activity Leader</b>	Activity Leaders help organize local activities with the assistance and involvement of youth and parents. Activities should further enhance the learning and development of the 4-H members. An Activity Leader may also provide 4-H members with help preparing for county activities such as Share-the-Fun, Design and Construction, Public Speaking or Service-Learning programs.
<b>Teen Leader</b>	A Teen Leader is an experienced older 4-H member who assists with local 4-H programs. There are various levels of responsibility that a Teen Leader may assume. As the individual acquires experience and training, Teen Leaders may become a Project, Activity or even an assistant to an Organizational Leader for a local club.
<b>General Leader</b>	Certified volunteers who serve at-large in a club or at the county level. They are capable of stepping into a variety of roles and experiences as needed.
<b>Resource Leader</b>	Short-term volunteer with special skills, knowledge and experiences who serves as an instructor for a special interest program(s), mentor to a planning committees/club, etc.
<b>Executive Committee</b>	This is the team of local club youth officers elected by the membership. They are responsible for planning and conducting the club's business meetings and representing their club at a county level.
<b>Advisory Committee</b>	The Advisory committee is composed of 4-H members, officers, parents, and volunteers who represent the diverse interest of the club. This group assists the club leader in developing and implementing the annual Local Club Program Plan.
<b>Committee(s)</b>	Clubs will have standing committees and short-term committees. Standing committees meet ongoing needs such as community service, fund raising, etc. Short-term committees are formed for a brief time for a specific purpose i.e., Share-the Fun, End of Year Picnic, Club T-shirt, etc. Committees should be composed of club members, parents and officers.

**County  
Extension  
Educators**

OCES Extension Educators are responsible for managing the total 4-H program in the county. A para-professional or program assistant who assumes some of the responsibilities may assist the professional staff. The OCES staff provides support and training for implementing and maintaining a volunteer-leadership program. They provide Parent-Volunteer TCE/training that provides the tools and knowledge that parents and volunteers need to successfully implement, maintain, and develop 4-H clubs and members. Extension personnel work cooperatively with volunteers, families, and 4-H members. Extension staff are responsible for the approval of youth and adult enrollment and processing 4-H Program Fee transfer.

**Para-  
Professional**

(Role as of  
January 2006 –  
list not all  
inclusive)

- Assist Extension Educator and OCES volunteers with preparation for, and coordination of county and multi-county events and activities related to FCS, 4-H, AG and RD.
- Assist with the coordination of Extension (FCS, 4-H, Ag, Horticulture, RD) meetings and programs by gathering and organizing resources and materials.
- Program Assistant may serve as a resource person for clubs (HCE and 4-H). The Program Assistant is not to serve as 4-H organizational leader.
- Assist with marketing and visibility of OCES in schools and with other organizations/audiences.
- Program Assistant may conduct educational programming for youth as part of camps, school enrichment, after-school programs, club meetings, etc. with the supervision of Extension Educator.
- Program Assistant may chaperone youth as a certified volunteer. Program Assistant is not to chaperone 4-H events as a staff member.
- Program Assistant may attend events such as state leadership development conference, state HCE meeting, Cattlemen's Association meeting (etc.) on their own time as either a volunteer or member of the organization.
- As requested, attend club and association meetings to maintain a working knowledge of programs and decisions related to OCES affiliated groups.
- Assist Extension Educator with correspondence, newsletters, press releases, and yearbooks. Extension Educator has primary responsibility for the content and editing of publications.
- Assist Extension Educator with livestock show and fair management (take entries, help in ring, weigh-in, nominations, etc.).
- Follow all OCES policies and behavioral guidelines. This includes appropriate roles associated with youth livestock events and ethics guidelines.
- May assist with enrollment data entry and reviewing enrollment for the Extension educator.

Oklahoma 4-H Volunteer Management System  
**I.S.O.T.U.R.E. Model**

# Recognize



- I** Identify: Identifying volunteer opportunities within the organization and developing appropriate written position descriptions for them.
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- O** Orient: Orienting selected volunteers to the role expectations of the volunteer position and organization.
- T** Train: Stimulating and supporting volunteer efforts to acquire knowledge and to develop attitudes and skills that will improve the quality of their performance in volunteer positions.
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- R** **Recognize: Recognizing and rewarding volunteers for the positive contributions they make to the organization.**
- E** Evaluate: Evaluating and providing professional feedback as to the individual's performance and continued growth as a volunteer.



## 4-H Recognition Model

Recognition is one way to help individuals become self-directed, productive, and contributing citizens. 4-H uses five types of recognition. Each support, motivate and encourage people in a unique way. This model presents a balanced approach to effectively using recognition as a way of motivating members and volunteers.



1. Participation in educational experiences.
2. Making progress toward self-set goals.
3. Achieving standards of excellence.
4. Excelling in peer competition.
5. Demonstrating excellence in cooperation.



For additional information see fact sheet 4H.VOL.105 4-H Recognition Model.

## Motivation

A psychological definition of motivation is defined as the process that initiates, guides, and maintains goal-oriented behaviors. Motivation is what causes us to act, whether it is getting a glass of water to reduce thirst or reading a book to gain knowledge.

It involves the biological, emotional, social, and cognitive forces that activate behavior. In everyday use, the term *motivation* is frequently used to describe *why* a person does something.

Two primary forms of motivation are Intrinsic and Extrinsic motivation. To effectively motivate volunteers, it must be understood that we are each unique with incredible potential. Our recognition program must allow for “appropriate, effective and sensitive recognition responses.” Vineyard (1988), an understanding of motivation helps a volunteer manager understand and recognize what turns certain people on and off.

**Intrinsic motivation** means the person’s motivational stimulus comes from within. This individual performs or engages in activity for one’s own benefit rather than for some external reward. Motivations for:

- Acceptance
- Curiosity
- Honor
- Independence
- Order
- Power
- Social Contact
- Social status

**Extrinsic motivation** means the person’s motivation stimulus comes from outside. We perform or engage in activity to earn a reward and avoid punishment. Forms of motivation:

- Public recognition or affirmation
- Reward – money, award, bonus
- Incentive - organized activity, gift, medal, etc.



## A Plan for Providing Incentives

Our volunteers have made a choice to work for the 4-H program. It is in our best interest to retain them for an extended period. Consciously planning to provide incentives will...

- Increase morale – Thank you and good job go a long way!
- Keep good volunteers and attract more volunteers – Good news travels fast and people like a positive environment in which to volunteer!
- Increase productivity – Recognize people for doing a good job, creating a safe and healthy environment for positive youth development, supporting the 4-H Positive Youth Development effort, etc.
- Decrease real and perceived favoritism – When volunteers are rewarded equally for actions and/or longevity harmful behaviors such as jealousy and envy are less likely to take root.



Recognition is important to the volunteer management process whether it be our long term or episodic volunteer. Let the individual know the impact and outcome their service had on the program. The individual knows how much time they volunteered, Jackson says give them specifics such as, "Thank you for making X difference in the lives of Y (number of) young" people," rather than "Thank you for sticking with us for five years!" Jackson, 2002 energizeinc.com

To sustain an incentive program put it in writing, be committed to your goals, be consistent, follow-through, involve others in the process and review the program regularly. Don't forget to ask those being recognized, "What is meaningful to you?"

Incentives should be timely. Wait too long and you have lost the excitement and momentum. For example, if a volunteer completes all their certification requirements provide them written affirmation or present a certificate (see Resources) in a public meeting.

Meaningful, less material or nonmaterial, incentives include:

- Praise – simple thank you note, handshake, an extension of gratitude, feature story blog/website/newspaper.
- Honor(ing)
- A meal – picnic, banquet, etc.
- Training – quality programming which draws one to participate
- Public Recognition
- Retreats
- Social Events
- Increased independence – demonstrates confidence in the volunteer's ability to do a job well; allow self-direction
- Networking opportunities – time with peers

Source: The Community Toolbox is a service of the [Work Group for Community Health and Development](#) at the University of Kansas.

Check out another invaluable resource from Everyone Ready ® titled *Informal Recognition: Creating a Culture of Appreciation* the material complements and enhances the information in this section. All Everyone Ready resources can be found at <http://www.4-h.org/resource-library/professional-development-learning/4-h-volunteer-development/>.

# County, District, and State Recognition programs

## County Recognition

Each county is encouraged to have a formal and informal volunteer recognition process in place. An informal recognition might be planned by the county officers/teen leaders. It could be as simple as a dinner and entertainment. A formal recognition program might consist of youth and/or volunteers nominating individuals for public recognition.

Involve a committee of volunteers to help draft the guidelines for public recognition. Revisit the guidelines periodically to make sure the process is working for the county program.

## District and State Recognition

A district and state recognition program called *4-H Salute to Excellence Volunteer Recognition Award* recognizes 4-H volunteers who demonstrate exemplary service to 4-H, while promoting service through volunteerism as both an opportunity and a privilege.

- ✿ The **Volunteer of the Year Award (VOY)** is for certified 4-H volunteers who have served for **less than 10 years** at the local, county, district, or state level.
- ✿ The **Outstanding Lifetime Volunteer Award (OLV)** is for current 4-H volunteers, who have served **10 or more years** at the local, county, district or state level.

Guidelines and nomination processes are reviewed and updated annually. The application packet is posted on the [Oklahoma 4-H website](#) (2023) and is due to the district program specialist at a designated time each spring.

## Certificates

Two certificates are available for recognizing certified volunteers. The first is presented to new volunteers who complete the certification process. The other recognizes the individuals who achieve the annual continuing education requirements.

Oklahoma 4-H Youth Development recognizes

\_\_\_\_\_ has successfully completed \_\_\_\_\_ units in continuing educations, and an annual review of the University's Working with Minors and Title VI, VII & IX policy in \_\_\_\_\_ County.

**Annual renewal of  
4-H Volunteer Certification**

County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_  
County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_

OSU EXTENSION  
4-H YOUTH DEVELOPMENT

Updated 3/2023

Oklahoma 4-H Youth Development recognizes

\_\_\_\_\_ has successfully completed the training and requirements to be recognized as a certified 4-H Volunteer and has agreed to accept the duties and responsibilities necessary to partner with the Oklahoma 4-H Youth Development program.

**Oklahoma 4-H  
Certified Volunteer**

OSU EXTENSION  
4-H YOUTH DEVELOPMENT

County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_  
County Extension Educator \_\_\_\_\_ Date \_\_\_\_\_

18 USC 707

Updated 3/2023

Oklahoma 4-H Volunteer Management System  
**I.S.O.T.U.R.E. Model**

# Evaluate



- I Identify: Identifying volunteer opportunities within the organization and developing appropriate written position descriptions for them.
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Evaluation began with the *identification* stage of the ISOTURE model. Each sub sequential step is part of a greater PLANNING process, accomplishing small attainable goals during each step of the ISOTURE process. Working the plan provides a means for doing Volunteer Program Evaluation. Evaluation includes

- Reporting the total impact of Volunteer involvement at the local and county level.
- Performance assessment with a volunteer,
- Developing a plan of improvement with a volunteer
- Terminating a volunteer

To learn more on demonstrating the impact of volunteer involvement see Everyone Ready® - *Demonstrating the Impact of Volunteer Involvement* (2015), *Methods of Volunteer Program Evaluation* (2015) and *Volunteer Performance Assessment* (2015). These tools will assist in determining whether the program is mission-based; output-based; customer-based; standards-based, or outcome-based.

The text of this chapter is taken directly from a training titled *Volunteer Performance Assessment*. The curriculum is owned by Energize.inc and was made possible through a grant by Monsanto. This is one of collective group of trainings called Everyone Ready®. To access the complete set of original materials go to <https://4-h.org/resources/professionals/volunteer-development/everyone-ready/> (2023) Permission to share is granted for educational use with extension audiences only.



Everyone Ready®

An online volunteer management  
staff development plan

FROM ENERGIZE

## **Volunteer Performance Assessment: Assuring the Best from Each Volunteer By Andy Fryar ® 2011 Energize, Inc.**

### **Underlying Principles**

Organizations devote their time to recruiting, training, and orienting volunteers, but only a few gives adequate considerations to the effective assessment of individual volunteer performance, despite its importance to volunteer productivity. Many organizations assess only the level of success that the *overall volunteer program* achieves and overlook the performance of the volunteering individuals who ultimately drive organizational kudos.

This Guide focuses on how to review *individual* volunteer performance to improve individual productivity and, thus, better overall program achievements. (To be clear, it is not the intent here to measure the effectiveness or value of *overall* volunteer effort within the context of an entire program.)

When we speak of performance assessments or evaluations, we often have in mind the specific sit-down meeting between volunteer and supervisor. A successful appraisal includes actions well before the meeting, even during orientation

of a new volunteer. Consider the following key principles:

***Prepare Ahead and Establish Expectations from the Start***

Effective performance appraisal begins before a volunteer even starts with your agency! It is incumbent on an organization to understand why it wants to involve volunteers, the range of tasks that will be designated to each team member, and the desired outcomes that should eventuate from that involvement. Volunteer position descriptions should be produced for each volunteer role, which clearly outline expectations of each team member. This document should also clearly outline the fact that volunteers will be expected to participate in regular performance appraisals as an integral part of their role. This information should be shared with new volunteers at the time they join your organization. In doing this, an expectation is established early on that performance appraisals will be conducted and there is less chance that volunteers will feel either offended or defensive when approached by their supervisor to participate in an assessment.

***Assessments Should Never Be a Surprise***

Effective performance assessment is not about catching people off guard while they are doing the wrong thing. Rather, structured assessments should only ever reinforce what has already been discussed with volunteers as they go about their roles on a day-to-day basis. When conducting an assessment, volunteers should be given adequate prior warning and notification to allow them time to prepare. The process that you plan to use should also always be clearly explained prior to the meeting.

***Combat Negative Feelings Associated with Evaluations***

Performance evaluations often evoke negative feelings in all of us. Perhaps the words “evaluation” or “assessment” conjure up memories of reprimands during our youth. For whatever reason, it’s a common feeling and, therefore, many of us wish to avoid giving or receiving evaluations. Try to play down the negative feelings by focusing on the positive aspects and outcomes of assessments and ensure that evaluations are an everyday part of your organizational culture. See the Additional Perspectives section of the Guide for a list of ways to focus on the positive.

***Choose a Method that Suits Your Organization***

Consideration should be given as to the best method for conducting assessments within your organization. This may depend on the size of your agency, the number of volunteers you need to assess, and the nature of the work that volunteers are performing. Assessment can occur utilizing a wide range of methods. It may be conducted in a reasonably informal manner, such as sitting down and discussing progress over a cup of coffee, right through to more formal methods that may include having both the volunteer and supervisor complete a “pre-assessment questionnaire” which is then used as the basis for discussions within the assessment process.

Even with a large number of volunteers, there should still be paid staff members or leadership volunteers designated to work with each volunteer and these supervisors or liaisons are the logical people to conduct performance assessments. You can also rotate your attention, focusing on a few units one year and then a few different units the next. Another option is to form an annual assessment team of representative volunteers whom you train to conduct peer evaluations.

### ***Come to the Assessment Well Prepared***

Remember that conducting a performance assessment can be just as challenging and difficult for the assessor as it is stressful for the person being assessed, especially if there are issues of poor performance needing to be discussed. Performance appraisals are usually unsuccessful because the supervisor has not prepared properly or has not given the volunteer the opportunity to prepare.

### ***Know Your Limit and Seek Help***

There is a limit to just how many volunteers one person can effectively appraise. You need to seek help and develop additional avenues of support if you work in an agency where you are responsible for a large number of volunteers. If there is a volunteer program manager on staff, use that person as a resource and advisor.

### ***Beware of Sample Volunteer Evaluation Forms***

Many volunteer program managers want sample evaluation forms from other agencies as a starting point for developing their own. This *seems* like a good place to start when designing a review, but a better option is to start with each volunteer position description. The position description is what the volunteer and you have agreed will be done. Not only will an evaluation based on such expectations make most sense to the volunteer, but it will

serve as a review of the agreement laid out at the beginning.

That being said, included in the More Resources section of this Guide are a few links to sample evaluation forms for those of you who experience writer's block when approached with this task. The examples are very basic and are included only for the purpose of a starting point. Proceed with caution.

### ***Design Assessments to Align with Each Volunteer's Position***

Assessing the performance of short-term volunteers may need to be done differently than for longer serving team members. Assessment at the completion of an assigned project rather than annually may be more appropriate and allow volunteers the opportunity to receive direct feedback directly after the completion of their task.

### ***Be Prepared to Act***

Remember, the primary purpose of undertaking performance assessments is to ensure change where change is needed. So, ensure you plan ahead for the time and resources needed to follow up on any issues that may arise. If you are conducting performance appraisals simply to file them away for recordkeeping's sake, you may as well not bother because all you are doing is creating work for yourself with no results.

## Appraisal of Performance

*Excerpted from chapter 14, "Personnel Management" in Volunteer Program Management: An Essential Guide (3rd edition) by Joy Noble, Louise Rogers and Andy Fryar, Volunteering SA, 2010.*

Appraisal is part of an overall approach to managing the performance of all staff, in this case volunteer staff.

The process of staff appraisal can and should be a mutually rewarding one for both the volunteer and the organization. It is during this process that the successes and achievements are identified and discussed, and concerns dealt with. The prospect of an appraisal should be raised during the orientation period and then a firm date set if the initial review concludes satisfactorily.

Having set the date for the appraisal session, the next step is to decide on the process and content of the session. This will depend largely on the degree of complexity of the duties performed by the volunteer.

Remember that this is a constructive, productive, and rewarding process, so it follows that both the supervisor and the volunteer will together decide on:

- length of session
- aspects of the position to be appraised
- appropriate action to be taken
- format and content of written report
- time to address strengths and areas to be developed



***The word "appraisal" is sometimes interpreted only in terms of poor performance. However, it is just as important to recognize and capitalize on excellent or exceptional performance.***

### **Outcomes of appraisal sessions include:**

- identification of further CE/training needed and/or required
- policy reviews
- recognition of work done by the volunteer
- identification of specific achievements for further acknowledgment
- review of specific work practices
- identification of best practices of the volunteer work
- possible need to re-locate the volunteer or terminate the arrangement

While not an exhaustive list, it gives an idea of the importance of the role of appraisal.

## ***Dealing with Poor Performance***

Some volunteer program managers find it difficult to take decisive action by providing feedback when performance is below expectations, knowing that the volunteer is working without monetary reward.

However, poor performance that adversely affects service provision and relationships needs to be faced sooner rather than later.

As Megan Paull at Edith Cowan University in Perth points out, “Managers must feel equipped to undertake this task (providing feedback) as part of their everyday role, so that problems are dealt with promptly and sensitively before they escalate to a level requiring other action.”

In looking at poor performance, it should not be presumed that the volunteer is necessarily at fault — the fault may lie within the organization, e.g., instructions were not clear, the allocated task was beyond the capabilities of the volunteer, or training was inadequate.

Questions need to be asked, such as:

- Are the volunteer’s expectations being met and in line with motivations being offered to the volunteer?
- Have job requirements and responsibilities been made clear?
- Do the volunteer’s skills and experience match job requirements?
- Are clear communication channels in place that encourage discussion of concerns as they occur?
- Did job requirements warrant institution of checks into the volunteer’s past performance or conduct before recruitment?
- Is a process of regular individual appraisal in place?
- Would a coaching/mentoring program be beneficial?
- Is the organization meeting its responsibilities and is additional training required / desired?

Taking the first step by identifying the concern and bringing it into the open is not easy. However, it helps to remember:

- to tackle the problem, not personalities.
- the alternative to acting will be long drawn-out dissatisfaction which is unlikely to resolve itself.
- while hesitating in case one person may be upset, many other people may be hurt.

Volunteer program managers need to realistically evaluate the problem and ask how the situation can best be remedied. They should resist the temptation to move an ineffective volunteer to another area of the organization in the hope that the problem will solve itself. While this may sometimes be a useful strategy, often it simply moves the problem from one area to another.

When matters cannot be resolved satisfactorily at the time, other strategies may be necessary such as termination procedures in relation to a volunteer, ensuring of course that appropriate procedures outlined in the organization’s grievance policy are followed.

A clause in the policy and practice guidelines will point the way and assist managers in taking decisive action in relation to poor performance. Here is an example below:



*Any dissatisfaction with performance levels of volunteers will be considered in the context of the workplace environment and dealt with as it occurs. A change in role, or withdrawal of the offer of voluntary work, will be considered only after the volunteer has been provided with an opportunity to improve performance to the required level.*

Evaluating performance requires managers to look at their own performance, that of the organization, and of the volunteer. They must also learn to deal with poor performance and capitalize on good performance.

### **Reporting Requirements of Appraisal**

These will be specific to the organization, but some form of reporting will or should be required following appraisal.

If a written report is required, it is important that the volunteer can read and comment on it and make suggestions for amendments before it is finalized.

Reports can include the opportunity to comment on:

- aspects of the position such as interaction with service recipients and other team members
- contribution to the program
- action required
- strengths
- areas to be worked on
- outstanding successes

Written reports, if so structured, can also serve as a valuable tool when evaluating the program by providing relevant information. Indeed, the staff appraisal process is an important part of the overall process of evaluation of a program.

*Supervision and appraisal are an important part of an organization's overall performance management strategy. They are designed to enhance performance in the delivery of quality services that meet the goals of the organization, boost morale and reduce stress. They also provide an opportunity for the achievements of volunteers to be identified, recorded, and acknowledged.*

### **Focus on the Positive**

The assessment of volunteer performance does not need to have a negative or punitive connotation. It is just as important to assess and acknowledge the good work being done by volunteers as it is to speak to volunteers for purposes of corrective action.

In addition to offering an opportunity for the review of performance, appraisals also provide a great chance for you to discuss future work plans, gauge ongoing motivations, and learn about untapped skills that volunteers may wish to contribute to your agency.

### **Assessment Is a Two-way Process**

Performance assessment is a two-way process designed to promote candid conversation between a supervisor and a volunteer. Not only is it an opportunity for volunteers to gain feedback about their individual performance, but it also offers a forum through which volunteers can share constructive feedback about the work of the program, their supervisor,

and the agency in which they work. Organizations seeking to gain the most from conducting volunteer assessments will actively structure evaluation sessions to cater for this outcome.

### **Assessment Can Be a Form of Recognition**

One key reason often cited for not performing volunteer assessments is the fear that volunteers will be offended. Rather than being offensive, effective volunteer assessments can create a situation where each team member feels that his or her contribution is both valued and appreciated. Effective assessment can lead to more satisfied volunteers who are not only more “productive,” but also who are more likely to stay with your agency longer. From this perspective, volunteer performance appraisals serve as a form of recognition, reward, and retention for program volunteers.

### **Ignoring Poor Performance Sends a Message to ALL Volunteers**

No one enjoys conflict. As a result, it becomes an all-too-easy option to turn a blind eye to the team member who is not performing as well as you might have hoped. However, ignoring poor individual performance will not make it go away, neither will moving the volunteer to another area. In fact, ignoring poor performance will often be terminal, not only to the volunteer in question but also to other team members who will grow increasingly resentful of the poor performance of their colleague and the inaction of both the volunteer program manager and the organization.

### **Recognizing Poor Performance Gives Volunteers Opportunities to Improve**

Remember that most volunteers genuinely want to “do good.” They don’t deliberately set out to perform poorly and so not alerting them to the fact that things are going poorly is disrespectful of their time and energy. It also does not afford them the opportunity to take corrective action to remedy the situation.

## **Establish a Comfort Level with Feedback for Volunteers and Paid Staff**

- It is important to consider ways that your agency can create an environment where the assessment of performance is a welcome and regular part of your organization’s everyday operations. Volunteers and paid staff alike need to understand and appreciate that performance appraisals are a key driver in the ongoing assessment of organizational success and not a threatening and negative experience used only when performance is poor.
- Try and fit appraisals into the normal “life cycle” of volunteer participation. For example, you may be able to schedule the first one to coincide with the end of a volunteer’s trial period with your agency. Anniversary dates from when a volunteer first started with your organization is another easy way to introduce appraisal appointments.
- Be aware that many volunteers will see you as a “person in authority” and, accordingly, they may not be as forthright as you would like in providing open and honest feedback. Therefore, involving key volunteers in the assessment process may be one way of gaining a deeper level of feedback from members of your volunteer team.
- Performance assessments should always be conducted in an environment that is conducive to the free flow of communication. Sitting across a desk in the “Manager’s Office,” for instance, may simply be intimidating and not at all useful in having a person relax and discuss her or his performance openly. Similarly, trying to converse in a noisy

coffee shop may also be problematic. A quiet yet relaxing area (like a volunteer lounge) will work best. Privacy should also be considered when selecting the best spot to talk.

### ***Plan Ahead and Know Why You're Doing It***

Knowing the reasons, you are conducting a performance review is critical. Think through what it is you want to learn about (and from) each volunteer whose work you have a chance to assess. Developing a set of standard questions helps to ensure that you don't get sidetracked or forget to cover specific spheres of performance.

#### **Possible Assessment Questions**

- Identify three specific things you did here this year that you felt were particularly effective or helpful.
- How much enjoyment and fulfillment are you currently gaining from your role as a volunteer?
- Do you feel your role is clearly defined?
- Are the reasons that you first volunteered with our organization being met?
- Describe those aspects of your volunteer role you find most rewarding.
- Describe those aspects of your volunteer role you find most challenging or difficult. How can we help you to deal with these?
- Do you feel adequately supported in performing your volunteer role?
- List three ways you believe we could better support you in performing your role.
- What would you most like to gain from your volunteer work over the next twelve months?
- Are you interested in trying a different volunteer assignment or working in another area?
- Are there any specific training opportunities you'd like to explore or skills you would like to develop?
- Are you experiencing any difficulties you'd like to share?

The complete training is available at <http://www.4-h.org/resource-library/professional-development-learning/4-h-volunteer-development/> (2023) and includes the guide, worksheets, support materials and references. These materials can only be used with extension audiences. Materials shared with non-extension audiences must be granted permission by Energize, Inc.

## Assessment Tool(s)

Being a Volunteer Manager means supervising the volunteers who we work with side-by-side. As explained in detail earlier, the supervisor must be intentional in providing formal and informal feedback throughout the program year.

### To Make the Best Better

The annual assessment is a time for the educator to assist volunteers in developing a plan to achieve success or “*make the best better*”. Your ability to communicate excitement and enthusiasm will often influence whether the volunteer maintains their affiliation with the 4-H program.

Let volunteers know when they are successful and why you perceived them to be successful. This reinforces positive behaviors or constructively re-focuses a volunteer on the nine competencies and forty-eight behaviors contained in the Oklahoma 4-H Volunteer Core Competencies table (see Resources). On the same note, it is equally important that you take teachable moments to provide feedback on how something could have been handled differently or how their behavior was not acceptable. Be sure that the volunteer understands what they need to do to improve or meet minimal standards. Dependent on the nature of the improvement it may be important to have deadlines for visible change AND a statement about maintaining the progress.

### Annual Assessment with Club Leaders

Extension educators will annually conduct individual visits with organizational leaders/assistant Club/Cloverbud leaders to discuss commitment, performance, and review responsibilities to the club/county 4-H program. If the volunteer received a copy of the assessment tool during orientation/CE opportunity and the volunteer has been receiving effective and meaningful feedback throughout the year nothing during the assessment will be a surprise. It will be an affirmation of service, success or constructive conversations previously documented with the volunteer. Both parties sign the annual assessment tool, and the Scan and upload the volunteer is provided a copy assessment to the volunteer’s profile.

### Assessment of other Certified Volunteers

As needed, the Extension educator should schedule visits with county committee chairpersons, adult PVA officers and other volunteers to discuss commitment, performance, and review responsibilities to the county 4-H program. A generic tool is available for these volunteers. Both parties sign the annual assessment tool, and the volunteer is provided a copy. Scan and upload the assessment to the volunteer’s profile.

## Preparation for Scheduled Appointment

Early in this guide, the focus of a volunteer manager has been on empowering volunteers to be successful in their work. Providing them with the information, training and supervision which build relationships unique to each volunteer and the role they have been hired to serve. Timely, honest feedback reinforces positive behavior and actions supportive of the positive youth development effort or redirects inappropriate behavior and performance problems before they become an issue.

1. Use the appropriate volunteer assessment tool (see **Forms** or [Staff Resources](#) (2023) listed under Volunteer Management Systems.
2. Schedule adequate time with the volunteer, no interruptions. This is to be quality time. Provide a variety of meeting times, at least 60 minutes with time between appointments. If two volunteers work closely with a club and there are no personal/individual challenges to resolve, consider meeting with them as a team. Enjoy a meal, go to/order lunch/breakfast/dinner. Meet before or after the volunteers work schedule. The key is keeping it convenient and relaxed.
3. Give great thought to filling out the assessment tool. An acceptable and encouraged practice would be to provide a copy of the document to the volunteer in advance for a *self-assessment*. As the supervisor you can add to the self-evaluation and be prepared to address items they have noted or haven't noted. Keep comments positive and constructive, we all have room to grow.
4. These meetings provide an opportunity to bounce ideas around and introduce new ideas and concepts. The responses and thoughts expressed can be pleasantly surprising when people have quality time and are not being influenced or affected by possible peer influence.

Article titled *Provide Feedback That Has an Impact*, by Susan Heathfield.

[http://humanresources.about.com/cs/communication/ht/Feedbackimpact.htm?utm\\_term=general%20forms%20of%20recognition%20people%20like&utm\\_content=p1-main-6-title&utm\\_medium=sem-sub&utm\\_source=gemini&utm\\_campaign=adid-bbfb7eff-d369-4496-b8e5-1fb4ed4c94b9-0-ab\\_tse\\_ocode-33082&ad=semD&an=gemini\\_s&am=exact&q=general%20forms%20of%20recognition%20people%20like&dqi=&o=33082&l=sem&qsrc=1&askid=bbfb7eff-d369-4496-b8e5-1fb4ed4c94b9-0-ab\\_tse\\_2023](http://humanresources.about.com/cs/communication/ht/Feedbackimpact.htm?utm_term=general%20forms%20of%20recognition%20people%20like&utm_content=p1-main-6-title&utm_medium=sem-sub&utm_source=gemini&utm_campaign=adid-bbfb7eff-d369-4496-b8e5-1fb4ed4c94b9-0-ab_tse_ocode-33082&ad=semD&an=gemini_s&am=exact&q=general%20forms%20of%20recognition%20people%20like&dqi=&o=33082&l=sem&qsrc=1&askid=bbfb7eff-d369-4496-b8e5-1fb4ed4c94b9-0-ab_tse_2023)

Have a consistent set of questions to ask. Send them in advance to the volunteer so they can be prepared. Questions should be general in nature and can help:

- You grow as a professional.
- The program/club grow , as well as retain families and volunteers.
- Identify needs for the individual, their role, club, and families.
- Guide program/CE/training.
- Confirm or invalidate your perceptions of needs and interests.

Both the time and information will be invaluable in planning short and long-term goals which meet the needs and interests of your clientele.

## Probation

There can be many reasons a volunteer might be placed on probation. Probation is intended to be a constructive process where there is an agreed plan of improvement between the volunteer and the supervisor. The supervisor must be committed to assisting the volunteer with training, resources, and timely check-ins. The volunteer must be committed to making behavioral changes and/or attending training and putting the content into practice.

Often probation can be avoided by providing information and effective communications. As Sydney Harris, journalist for the Chicago Daily News said, *“The two words ‘information’ and ‘communication’ are often used interchangeably, but they signify quite different things. Information is giving out; communication is getting through.*

Playwright, journalist, and economist George Bernard Shaw said, *“The single biggest problem in communication is the illusion that it has taken place.”*

From the beginning, the focus of a volunteer manager has been on empowering volunteers to be successful in their work. Providing them with the information, training and supervision which build relationships unique to each volunteer and the role they have been hired to serve. Timely, honest feedback reinforces positive behavior and actions supportive of the positive youth development effort or redirects inappropriate behavior and performance problems before they become an “issue.

When probation is necessary, review *Volunteer Performance Assessment: Assuring the Best from Each Volunteer* at the beginning of this section.

### Is Probation Necessary?

A few reasons an Extension educator would be considering probation”

1. Certification Requirements have not been met over an extended period.
2. Behavioral Guidelines have been broken.
3. Breach of published Rules or Guidelines.
4. Volunteer Agreement/Position Description has not been fulfilled.
5. Others are put at risk physically and/or emotionally.

The volunteer should understand they are on probation for a defined period or until the agreed plan/requirements has been met. During this time, any “restrictions” or “expectations” should be put in writing to the volunteer.

Keep records of all conversations, meetings, and correspondence (US Postal or electronic) shared with the volunteer regarding the probation. These records are to be uploaded to the individual’s profile in the data management system.

## Formal System for resolving 4-H Volunteer Personnel Issues

*Adapted from Rutgers policy for Resolving 4-H Volunteer Personnel Issues, Department of 4-H Youth Development, Rutgers Cooperative Extension, March 1997 – Rev. May 2002.*



Check out another invaluable resource from Everyone Ready® titled *Handling Challenging Behavior by Volunteers* the material complements and enhances the system outlined in the section. All Everyone Ready resources can be found at <https://4-h.org/resources/professionals/volunteer-development/> (2023)

4-H volunteers serve at the pleasure of the Oklahoma Cooperative Extension Service.

Any actions, which conflict with the Volunteer Enrollment, Volunteer Agreement, Behavioral Guidelines or any other established rules or guidelines for sanctioned 4-H activities is grounds for immediate dismissal as a 4-H volunteer. This might include arrest or conviction for child abuse or neglect, violent crimes, unethical behavior, substance abuse, verbal abuse, physical abuse, or other serious offenses. In some cases, a volunteer may be suspended from duty until an investigation is completed. Decision on immediate removal or suspension will be made by the county Extension educator(s) in consultation with the respective district 4-H Program Specialist, District Extension Director, and the State 4-H Program Leader.

### WHEN TO USE THE SYSTEM

The process begins when it first becomes evident that a 4-H volunteer is not performing up to the expectations and standards of behavior listed in the Volunteer Agreement and Behavioral Guidelines. See the flow chart on the next page for a visual representation of the formal process described in this section. *Examples* include:

- **Unsatisfactory performance:** Inability or refusal to complete assignments or attend training, disregard for policy, refusal to accept supervision or cooperate with other volunteers or staff, inappropriate, discourteous, or unsportsmanlike behavior or language.
- **Misconduct:** Physical, emotional or verbal abuse of youth or other adults, substance abuse, committing a criminal act, misuse of funds, irresponsible handling of animals, vehicles or machinery.

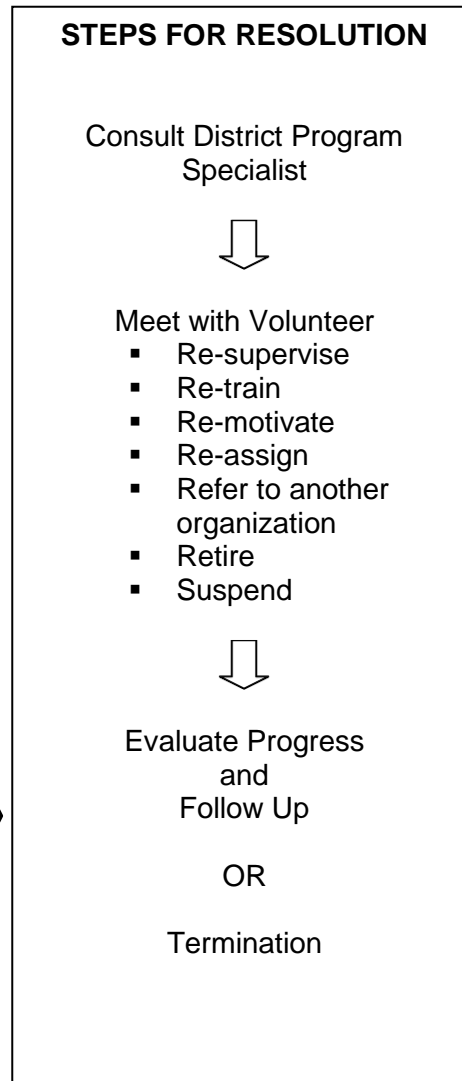
# Formal System for Resolving 4-H Volunteer Personnel Issues



**Purpose**  
 To resolve issues which affect the volunteer's performance in effectively working with youth, other volunteers, county 4-H staff and the 4-H program.

- Prevention Via Good Management Practices**
- Screen All volunteers
  - Maintain current volunteer documentation and agreements
  - Provide Position Descriptions
  - Conduct Thorough Orientation and Training
  - Observe Volunteers in Action
  - Evaluate Performance and Provide Feedback
  - Resolve Issues Quickly
  - Provide Adequate Recognition

- Identification and Documentation of Issues**
- Identification**
- Periodic Evaluation
  - Observation
  - Third Party Reports
- Documentation**
- Anecdotal Records/Verbatim
  - Public Record



**TERMINATION**

If the issue(s) remain unresolved following the steps for resolution, the 4-H staff member consults the district 4-H Program Specialist to proceed with steps to terminate the volunteer's appointment.



## Prevention Via Good Management Practices

The most important step in dealing with volunteer issues is to prevent them from happening. Applying the following good volunteer management practices will help you to keep this “system” on the shelf and out of use.

- **Screen All Volunteers:** Make sure that all volunteers have been fully screened prior to hiring.
- **Use Signed Volunteer Agreements:** Make sure that all volunteers read and sign the enrollment form and waivers. Review the waivers in person and answer any questions to ensure that they have a good understanding of the content.
- **Provide Position Descriptions:** Develop position descriptions cooperatively with all volunteers; provide training to ensure that they understand each responsibility.
- **Conduct Thorough Orientation and Training:** Provide a thorough orientation to all prospective volunteers. Offer regular and timely CE/training to all volunteers which include procedural changes and expectations.
- **Evaluate Performance and Provide Feedback:** Develop a method for regular evaluation of volunteer performance. Take the opportunity to observe volunteer performance when possible and provide feedback as appropriate.
- **Resolve Issues Quickly:** Work to resolve issues as soon as you are aware. Sitting on a problem only gives it a chance to grow more serious.
- **Provide Adequate Recognition:** Demonstrate your appreciation for the efforts of volunteers. Formal recognition, such as recognition events, trips, scholarships, awards, news articles and thank-you correspondence may be important for some volunteers, while others appreciate a kind word or a nice compliment about their work.

## Identification and Documentation of Issues and Problems

Review the [Volunteer Counseling and Dismissal Checklist](#) as you proceed through this section. (See Forms)

### Identification of the Issue

- **Periodic Evaluation:** Periodic evaluation of all volunteers will assist identifying possible trouble spots in volunteer performance. Maintaining a system of evaluation will also justify conducting an evaluation of an individual you may have reason to believe, but no actual documentation, is having or causing a problem.
- **Observation:** You may have observed a volunteer engaging in inappropriate or disruptive behavior. If possible, gently, and privately correct the individual during the "teachable moment" or as soon as possible to keep this behavior from escalating.
- **Third Party Reports:** You may receive reports from other staff, volunteers, or youth regarding the volunteer's behavior. Do not treat these as facts but try to further investigate and be sure to document all reports as noted below.

## Documentation

- **Anecdotal Records/Verbatim:** Keep written notes of personal observations, personal conversations with the volunteer or person making a complaint about the volunteer (in person or on phone). Date and record time of conversation or observation. Record details. Keep these records and all materials provided by others and the volunteer in the volunteer's online profile.
- **Public Record:** Arrests and/or convictions are usually public record. Keep newspaper reports and accounts. If you have definite, verifiable information that a volunteer has been arrested for behavior that would put youth, other adults, and the 4-H program in jeopardy; you may ask the volunteer to produce proof that all charges were dropped.

## Steps for Resolving the Issue

### Step 1: Consult the District 4-H Program Specialist

During or upon completion of documentation of a problem with a volunteer, consult with the district 4-H Program Specialist to discuss the situation and a range of possible solutions (see below). The district specialist may, in turn, consult with the State 4-H Office for advice and guidance in how to proceed.

### Step 2: Meeting with the Volunteer to Cooperatively Design a Plan for Resolving Issue

- a. Arrange to meet with the volunteer in a formal setting (4-H Office or a neutral location) to discuss the issues and to cooperatively work out a solution. If you feel that the situation demands a third party to be present to objectively record notes or for personal safety, let the volunteer know ahead of time that this individual will be involved. The third party could be a Extension staff person from your county, a 4-H staff person from another county or the district program specialist. This person should not be a volunteer.
- b. At the meeting, describe the issue clearly, providing the volunteer with documentation as needed and/or appropriate (be sure not to breach confidentiality of discussions with others in providing this information). Refer to any volunteer agreement/waiver which explains how the problem behavior is in conflict with signed documents and/ or how the volunteer is not meeting expectations outlined.
- c. Review possible solutions with the volunteer. The following solutions are not listed in any priority.

**Re-supervise the volunteer.** Volunteer may simply need to be reminded of rules/procedures and why they must be followed.

**Re-train the volunteer.** Some performance problems may be the result of ignorance. The volunteer may just need reminding or may need more extensive training.

**Re-motivate the volunteer.** The volunteer may be suffering from boredom or loss of enthusiasm. Re-interest volunteers by giving them a new challenge or suggest a sabbatical during which they can refresh their outlook.

**Re-assign the volunteer.** This could be a case of mismatched personalities, or the wrong person in the wrong volunteer position. Consider moving the volunteer to a new position for which there is a more suitable match in skills, interests and needs. Consider moving the volunteer or others concerned when it is a matter of mismatched personalities.

**Refer the volunteer to another agency.** Perhaps there is a more suitable placement for the volunteer at another agency, where their talents and interests can be used more productively.

**Retire the volunteer with honor.** Arrange for special recognition, honoring the contribution they have given. This formal, but honorable, separation allows the volunteer to leave without guilt and with personal dignity.

**Suspend the volunteer.** If the case involves a criminal charge or behavior that may threaten the safety and well-being of others, you may need to suspend the volunteer from all 4-H activities and volunteer roles until the issue is resolved.

- d. Once you and the volunteer have agreed on the step or steps to be taken, at the end of the individual's 4-H Volunteer Agreement or on a separate page attached to the agreement, write or type in any actions required on the part of the volunteer, and your part if applicable, to resolve the problem. This statement should include a time frame by which improvement should be made and a tentative date for evaluation of progress. This should be dated and signed by both you and the volunteer. Except in the case of suspension, the volunteer is on probation until the evaluation meeting is held.
- e. If an agreement cannot be reached at this time, inform the volunteer that they may choose to resign from the position; if not, they will be suspended from all volunteer activities, and steps may be taken to terminate the volunteer appointment.

### Step 3: Evaluating Volunteer Progress

- a. On the appointed date of the evaluation, meet face to face in a formal situation to review the progress made. Possible outcomes include:

**Expectations Met.** The volunteer has met all expectations and is re-instated completely.

**Expectations Partially Met.** The volunteer has partially met expectations and agrees to continue to try to meet expectations, while remaining on probation. Another date for a meeting to evaluate progress is set.

**Expectations Not Met.** The volunteer has not and/or does not intend to meet expectations. Inform the volunteer that they may choose to resign from the position; if not, they will be suspended from all volunteer activities, and steps may be taken to terminate the volunteer appointment.

- b. Following the evaluation meeting, write a letter to the volunteer confirming the outcomes discussed at the meeting. Upload the document to the volunteer's profile in the data management system.

## Volunteer Appeal Process

Volunteers serve at the pleasure of the Oklahoma 4-H organization and because personnel action has been completed in consultation with District 4-H Program Specialist there shall be no formal appeal process.

## Termination of Volunteer Appointment

### Step 1: Consult District 4-H Program Specialist

After following the procedures for resolving the issue, if the staff member wishes to terminate the volunteer's appointment, he or she should consult with the district 4-H Program Specialist providing documentation of procedures followed for resolving the issue. The specialist will decide the best way to proceed.

### Step 2: District 4-H Program Specialist Action

The district 4-H Program Specialist will review all information in the decision to terminate. The specialist may decide that termination is appropriate and consult with the State 4-H Office to confirm that termination is justified. The specialist will work with the 4-H staff member; State 4-H Office and even possibly OSU Legal Counsel to compose appropriate letters, etc.

### Step 3: Meeting and Follow Up with Volunteer

- a. The 4-H staff member will arrange to meet with the volunteer in a formal setting (4-H Office or a neutral location) to discuss the issues and to cooperatively work out a solution. If it is felt that the situation demands a third party to be present to objectively record notes or for personal safety, the staff member should make the arrangements and let the volunteer know ahead of time that this individual will be involved. The third party could be a Extension staff person from your county, a 4-H staff person from another county or the district program specialist. This person should not be a volunteer.
- b. At the meeting, the 4-H staff member will review the steps that have been taken to resolve the issue and will inform the volunteer that, since the issue cannot be resolved to both parties' satisfaction, the volunteer appointment must be terminated. In the discussion, the 4-H staff member should follow these principles:

***Be quick, direct and absolute.***

***Announce; don't argue.*** If the above steps have been followed, all the necessary discussion has taken place and all the necessary facts have been learned and documented. At this point, the staff member is terminating, not fact finding or problem solving.

***Do not attempt to counsel or give advice.*** Counseling has already occurred in earlier steps. The volunteer will not accept advice from the staff member, as the relationship has now been damaged.

- c. The 4-H staff member will confirm the termination in writing in the form of a letter. This letter should have been prepared and reviewed by the district 4-H Program Specialist and State 4-H Office in advance of the meeting. It is important to

- quickly settle unfinished logistical items to end the relationship – collect leader's guides, keys, bank accounts, equipment, etc.
- d. If the individual will not accept the termination and/or continues to participate in the 4-H program as a "volunteer," the staff member should contact the district 4-H Program Specialist who will determine appropriate action. At this point, the termination should not be reversed, as approval to proceed should have already been given by the specialist, State 4-H office and legal counsel.
  - e. Record the volunteer's termination in the online data management system, upload all documentation. Membership status will be inactivated/archived as ineligible. Records will NOT be deleted.



Oklahoma 4-H  
**Volunteer Management System**

# Forms



## The following forms are posted at

Please go to the web site for the most current version of forms and materials.

\*\* Links as of 11/2023.

### **Staff Resources** - <https://4h.okstate.edu/educators/staff-resources/>

#### **VMS Forms, Letters and Certificates**

##### **Continuing Education**

- CEU Postcard
- Dismissal Check Sheet

##### **New Volunteer and/or Club Leader**

- New Volunteer Certification Certificate

##### **Re-certification and Assessment**

- Volunteer Assessment
- Annual Volunteer Renewal Certificate
- Club Leader/Cloverbud Leader Annual Assessment

##### **Example Letter/Email**

- Letter 1 | Applicant: NEW Applicant ONLY-Certification Complete
- Letter 2 | Applicant: Denial of Applicant
- Letter 3 | Enrollment: Certification/Enrollment Incomplete
- Letter 4 | Enrollment: Final Notice Certification Process Incomplete
- Letter 5 | Enrollment: Annual Continuing Education Requirements Completed
- Letter 6 | Recognition: Annual Continuing Education Reminder
- Letter 7 | Recognition: Continuing Education not Completed

##### **Volunteer Advisory Committee**

- Confidentiality Postcard

### **Position Descriptions** - <https://4h.okstate.edu/educators/volunteer-management-system/>

- Activity Leader
- Chaperone - Day Event
- Chaperone - Overnight
- Cloverbud Leader Agreement - This form is now part of the ZSuite enrollment system and is completed online as of August 2021.
- Club Leader Agreement - This form is now part of the ZSuite enrollment system and is completed online as of August 2021.
- Parent-Volunteer Association Officer/Board Member
- Project Leader
- Teen Leader
- Template - Positions Description





Sample document could be used if registration, agenda, program, etc. cannot be produced by the volunteer.

**Oklahoma 4-H Youth Development Program  
4-H PARENT-VOLUNTEER CONTINUING EDUCATION CREDIT**

4-H Volunteer's Name

Home County

Program/Conference/Workshop

Type of program

Date

Length of program

Place

Sponsoring Organization

Contact phone number for sponsor

Sample

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**Signature of Sponsoring Organization Representative**

# Volunteer Counseling and Dismissal Checklist

\_\_\_\_\_  
(Name)

<b>Prior to Making A Decision</b>	<b>Yes</b>	<b>No</b>
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?		
<b>Documentation</b>		
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?		
<b>Taking Action</b>		
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?		
<b>Communicating Actions and Decision</b>		
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?		

Oklahoma 4-H Volunteer Management System

**Reference Form**

Position: 4-H Volunteer working directly with youth



\_\_\_\_\_ is applying to do volunteer work with youth in the Oklahoma Cooperative Extension Service 4-H Youth Development Program and has given your name as a reference. The information you provide is confidential.

Adults in 4-H volunteer positions help youth develop and learn new skills, promote cooperation and team work, teach responsibility for managing project work and personal decisions, promote healthy life-styles and positive choices, and encourage a sense of civic responsibility.

The Oklahoma Cooperative Extension Service seeks your assistance in selecting the best-qualified people to serve in volunteer roles and will appreciate your prompt completion of this reference form.

How long and in what capacity or positions have you known the applicant?

4-H Volunteers should possess certain competencies. Please use this checklist to evaluate the applicant's qualities of:

4 H Volunteer Competency	Applicants qualities:	Excellent	Good	Fair	Not Known
Communication Skills	Oral communication skills				
Communication Skills	Written communication skills				
Interpersonal Skills	Concern for others				
Interpersonal Skills	Respect for other				
Interpersonal Skills	Patience				
Flexibility	Sense of humor				
Flexibility	Resourcefulness				
Flexibility	Flexibility				
Decisiveness	Makes well-informed decisions				
Decisiveness	Exercises good judgment				
Initiative	Self-starter				
Initiative	Dependability				
Initiative	Sense of fairness				
Initiative	Role model for youth				
Organizational Skills	Ability to organize and complete task				
Organizational Skills	Pro-active approach to problem-solving				
Service Orientation	Sense of honesty				
Team work	Team player				
Teamwork	Enthusiasm				
Institutional Systems	Supportive of policies and procedures				
Institutional Systems	Understanding of children and youth development				

Please share your impressions and knowledge of the applicant's qualifications for the position by using specific examples where possible.

1. How does the applicant interact with children?
  
2. How would you rate the applicant's ability to work in a volunteer role with youth? Other adults/volunteers?
  
3. What additional skills, abilities, and attributes does the applicant have that would be helpful in this position?
  
4. Does the applicant have any experience working with people who are developmentally challenged, from different ethnic/racial backgrounds, alternative lifestyles or from different socio-economic backgrounds? If so, please describe.
  
5. How would you describe the applicant's ability to handle records and/or money?
  
6. Would you be willing to place your son or daughter, or any other child for whom you are responsible, under their leadership?      Yes                  No      WHY?
  
7. Do you know of any reason why this person should NOT be considered as a 4-H volunteer working with youth?      Yes                  No                  WHY?

Date

Signature

Print Name

Thank you for your time.

Date Received in  
Extension Office

Return to :

Oklahoma State University, in compliance with Title VI and VII of the Civil Rights Act of 1964, Executive Order 11246 as amended, Title IX of the Education Amendments of 1972, Americans with Disabilities Act of 1990, and other federal laws and regulations, does not discriminate on the basis of race, color, national origin, gender, age, religion, disability, or status as a veteran in any of its policies, practices or procedures. This includes but is not limited to admissions, employment, financial aid, and educational services.

Oklahoma 4-H Volunteer Management System  
**Reference Form for Phone or Face-to-Face Interviews**  
 Position: 4-H Volunteer working directly with youth



References Name		Phone Number	
Address	City	State	Zip
Applicant's Name	Position considered for:		
Interview conducted by:		Date:	

\_\_\_\_\_ is applying to work with youth in the Oklahoma Cooperative Extension program and has given your name as a reference. *(Briefly explain the position the volunteer will be assuming, or provide a written job description.)* I would like to ask you some questions. Your comments will be considered confidential information.

How long have you known the applicant?	
What is your relationship with the applicant?	
Have you ever worked with the applicant in another volunteer capacity? If so, please describe:	
What strengths would the volunteer bring to this position?	
What difficulties would the applicant have in fulfilling the duties as outlined in the position?	
Is the applicant dependable?	
How would you describe the applicant's ability to handle records and/ or money?	
Please describe situations where you have observed the volunteer interacting with youth.	

Please describe experiences the volunteer may have had in working with people who are developmentally disabled, from different ethnic/racial backgrounds, alternative lifestyles or from different socio-economic backgrounds.	
Would you be willing to place your daughter or son, or any other child for whom you are responsible, under her/his leadership?	
Would you consider this applicant a positive role model for youth?	
Do you know any reason why this person should NOT be considered for this position?	

Thank you. Your assistance in helping the Oklahoma Cooperative Extension Service select the best-qualified people to serve in volunteer roles is sincerely appreciated.

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Oklahoma 4-H Volunteer Management System  
**Applicant Interview Form**  
 Position: 4-H Volunteer working directly with youth



Applicant's Name		Phone Number	
Address	City	State	Zip
Location of Interview	Position discussed:  The volunteer <u>was provided</u> a written position description for the role(s) being considered?		
Interview conducted by:		Date:	

The following list of questions relate to the Oklahoma 4-H Volunteer Core Competencies. During the interview, consider the competencies and how well the applicant will fit the volunteer position being discussed. Consider how the volunteer listens and responds to the questions.

<p><b>Communication Skills</b> - What public speaking or writing experiences do you have? How comfortable do you feel speaking in front of a group? What makes a good listener? What ways could you use to communicate with the families in your club/project?                  COMMENTS:</p>
<p><b>Interpersonal Skills</b> - What kind of people do you find easy to work with? How do you handle conflict? How would you work with an upset parent or leader? How do you handle criticism? What kind of people do you find hard to work with and how do you handle that? What kind of corrective techniques would you use with: disruptive or unresponsive children, a child who deliberately defies your request for cooperation or a child who consistently misses meetings without explanations?                  COMMENTS:</p>



**Flexibility** - How do you deal with situations that don't go as you planned? What situations cause you stress and how do you deal with these?

COMMENTS:

**Decisiveness** – How do you go about making complex decisions? Describe something you learned the hard way when making decisions and choices as a child/adolescent? How did the situation influence how you make adult decisions?

COMMENTS:

**Initiative** - Describe one project for which you had responsibility from the beginning to the end. What did you do when you are unable to complete a commitment? Do you have available transportation, if needed?

COMMENTS:

**Organizational Skills** - How do you manage your time? What record keeping experience have you had? What experiences have you had organizing a group of children and/or adults? Describe how you would help a group of youth come to a decision. Describe instances when you have planned or conducted meetings. Describe an ideal meeting. Are you willing to attend educational programs to assist you in your volunteer role?

COMMENTS:

**Service Orientation** - What experiences have you had working with people of different backgrounds? How do you feel about working with people different from yourself, e.g., different racial ethnic/racial background, developmentally disabled, alternative lifestyles, different socio-economic background, etc.?

COMMENTS:

**Teamwork Skills** - What experiences have you had in working with adults and children? What skills and qualifications do you have? Describe how children/others would view you as a role model. How do you promote teamwork? How will you involve parents in your program? What previous leadership roles have you had in other organizations? What kind of rewards keep you motivated?

COMMENTS:

**Institutional Systems** – What is your understanding of the primary purpose of OCES and 4-H Youth Development Programs? What experiences should 4-H offer to develop youth? What does 4-H mean to you? What activity(s) or program changes might grow and retain 4-H members/families? Why do you want to be a 4-H volunteer? What is your view on competition? How important is winning to you?

COMMENTS:

Based upon the interview would you recommend the applicant's appointment as a 4-H volunteer for the position(s) discussed?	Yes	No	Uncertain
Would the applicant be a good candidate for another position? If yes specify.	Yes	No	Uncertain

Action or follow up needed:

Date Received	Signature of Interviewer
---------------	--------------------------

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## 4-H ORGANIZATIONAL/CLUB OR CLOVERBUD LEADER ASSESSMENT

Annually, the Extension Educator(s) and the organizational leader(s) meet to talk about the volunteer's personal and club goals, accomplishments, and challenges related to their role. It is recognized that these are the minimum expectations; individual counties may make additions to this document.

Name: \_\_\_\_\_ Club \_\_\_\_\_ Year \_\_\_\_\_

**Continuing Education:**

- 4-H Volunteer Enrollment Active
- Four Continuing Educations completed, if not how many completed \_\_\_\_\_
- Working with Minors – annual review of university policy
- OCES Civil Rights for Volunteers – annual review of university policy

**Club Management – Charter Renewal**

- Club leadership team did an annual reflection of their goals, accomplishments, and challenges.
- Club Charter renewal process completed.

**Specific Duties:**

	Not Met	Satisfactory	Superior		
1. Immediately addressed and reported any behavior that endangers a child or group of youth or negatively impacts the surroundings (meeting or activity). Appropriately used Incident and Accident form 8.	1	2	3	4	5
2. In advance of a meeting/activity/event, re-familiarize yourself with policies related to first aid, emergency plans or any other risk management procedures of Oklahoma State University, OK 4-H Youth Development, and the county 4-H program. Appropriately used Activity and Intent form 7.	1	2	3	4	5
3. Maintained clear, frequent, and timely communications with youth, families, volunteers, and extension office.	1	2	3	4	5
4. Club Charter renewed with the assistance of club members, volunteers, and parents.	1	2	3	4	5
5. Organized the club through youth officers and committees. Ensure these groups are trained for effective leadership – preparing for meetings, basic parliamentary procedure, conducting meetings, and developing committees.	1	2	3	4	5
6. Returned On TRAC plans, enrollment, financial review, and other required annual reports to the county office in a timely manner.	1	2	3	4	5
7. Assured that the Club is represented at all county Parent-Volunteer Association meetings.	1	2	3	4	5
8. Assured that the Club is represented at all county Volunteer Continuing Education opportunities.	1	2	3	4	5
9. To recruit and involve other volunteers in club programming efforts – project leaders, committees, programming, etc.	1	2	3	4	5
10.	1	2	3	4	5
11.					

**Primary Duties per Club Leader Agreement** (These are only a few of the primary duties listed on the club leader agreement.)

	Not Met	Satisfactory	Superior		
1. Ensured that the club maintained the “Civil Rights Assurance Statement” on behalf of Oklahoma 4-H.	1	2	3	4	5
2. Ensured the safety and well-being of club members and families attending meetings and activities.	1	2	3	4	5
3. Promote responsibility, personal growth, and planning of 4-H project work by members, families, and volunteers.	1	2	3	4	5
4.	1	2	3	4	5
5.	1	2	3	4	5



## 4-H VOLUNTEER ASSESSMENT

Every three –five years or as needed, the Extension educator(s) meet to talk about a volunteer’s personal goals, accomplishments, and challenges related to their role in the Oklahoma 4-H program. It is recognized that these are the minimum expectations; individual counties may make additions to this document.

Name: \_\_\_\_\_ Club \_\_\_\_\_ Year \_\_\_\_\_

### Continuing Education:

- Recorded in Data Management System:
- 4-H Volunteer Enrollment Active
- Four Continuing Educations completed, if not how many completed
- Working with Minors – annual review of university policy
- OCES Civil Rights for Volunteers – annual review of university policy

<b>Volunteer Agreement</b> (These are only a few of the duties listed on the “Volunteer Waiver” in the enrollment system.)	Not Met	Satisfactory	Superior		
1. To provide a safe and positive educational environment that will enable youth to grow, learn, and develop friendships.	1	2	3	4	5
2. To encourage responsibility, personal growth, and goal setting through project work, activities, and the clubs/SPIN groups in which youth are involved.	1	2	3	4	5
3. To inform youth/families, in a timely manner, of Extension/4-H programs and opportunities.	1	2	3	4	5
4. To actively seek and involve volunteers/youth/families from a variety of ethnic, racial, religious, and socio-economic groups in compliance with civil rights policies and regulations.	1	2	3	4	5
5. To participate in Parent-Volunteer Association/county leader’s council meetings and committee work of said groups.	1	2	3	4	5
6. To maintain sound working relationships with county Extension staff and fellow volunteers.	1	2	3	4	5
7. To inform county Extension Educator of needs and changes necessary for the continued growth of the 4-H program.	1	2	3	4	5
8. To actively recruit and involve parents and volunteers in programming efforts at the local, county, district, and state levels.	1	2	3	4	5
<b>Position Description Specific Duties:</b>	<b>Not Met</b>	<b>Satisfactory</b>	<b>Superior</b>		
1.	1	2	3	4	5
2.	1	2	3	4	5
3.	1	2	3	4	5
<b>Working Relationships</b>	<b>Not Met</b>	<b>Satisfactory</b>	<b>Superior</b>		
1. Relationship with other volunteers, parents, and families	1	2	3	4	5
2. Relationship with staff	1	2	3	4	5
3. Relationship with 4-H membership	1	2	3	4	5
4. Initiative	1	2	3	4	5
5. Flexibility	1	2	3	4	5
6.	1	2	3	4	5
7.	1	2	3	4	5

Extension Educator thoughts/comments to above areas:

Volunteer's thoughts or comments to above areas:

Volunteer's perceived most significant achievement during this past program year:

Areas/topics in which further continuing education would be desirable and/or areas for personal growth. Course of action discussed.

Overall, how does the volunteer feel about remaining in this position? What change in responsibilities or practices would improve the ability of the volunteer to contribute to the 4-H program?

What are the major goals for the volunteer to accomplish in their position during the next program year/defined period?

- 1.
- 2.
- 3.
- 4.

Other recommendation or comments:

Scheduled date of next assessment/meeting/follow-up:

Date

Volunteer's Signature

Date

**Educator's Signature**

Oklahoma 4-H  
Volunteer Management System

# Reference Tools







*Example Letter/Email #1*  
**NEW APPLICANT ONLY— CERTIFICATION COMPLETED**

- \* Edit/fill in the blanks and send letter/email to NEW volunteers who are ACTIVE/Certified. See Forms.
- \* Copy letter to stationery/letterhead. Double check all hyperlinks.
- \* Upload a copy of the letter/email to their online profile.

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

Welcome to the Oklahoma 4-H family. We are excited you have chosen to share your time, talents, and resources with the 4-H organization as a Certified 4-H volunteer. Enclosed/attached is a certificate of recognition.

As a reminder, three additional continuing education (CE) credits must be completed prior to July 1 to achieve your four annual CE credits. CE opportunities for this program year include:

- County Parent-Volunteer Continuing Education <date> <topic>
- County Parent-Volunteer Continuing Education <date> <topic>
- County Parent-Volunteer Continuing Education <date> <topic>
- County Parent-Volunteer Continuing Education <date> <topic>
- District Parent-Volunteer Conference<date>
- State Parent-Volunteer Conference <date>
- 4-H Tuesday Tool Time Webinars – Topics and registration posted at <hyperlink>
- Other

Our county has the following resources to keep you informed and ready to assist 4-H members, families, and clubs.

- <County> Webpage - <address>
- <County> Social Media - <address>
- <County> Newsletter - <mailed/emailed monthly>
- <County> Parent-Volunteer Association Meetings
- Parent and Volunteer Resources - <https://4h.okstate.edu/volunteers/>
- 4-H Project Literature - <https://4h.okstate.edu/projects/>
- Oklahoma 4-H Facebook - <https://www.facebook.com/Oklahoma4H/>
- Oklahoma 4-H Webpage - <https://4h.okstate.edu/>

Please do not hesitate to contact the Extension office for assistance.

Sincerely,

<name>  
Extension Educator  
4-H and Youth Development Programs  
<email>

*Example Letter/Email #2*

- \* Contact district and state office.
- \* Edit/fill in the blanks and send letter/email to NEW volunteers who are denied certification before a background check. Denial based on BC will be managed by the State.
- \* Copy letter to stationery/letterhead. Double check all hyperlinks.
- \* Upload a copy of the letter/email to their online profile.

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

After careful consideration, \_\_\_\_\_ County Cooperative Extension does not find your qualifications compatible with our needs and services in the position of 4-H volunteer in the Oklahoma 4-H program. For this reason, your application has been denied.

Thank you for your interest.

Sincerely,

<name>

Extension Educator

4-H Youth Development Programs

<email>

- \* Edit/fill-in the blanks and send letter/email to volunteers who have not completed one or more of the steps in the certification process.
- \* Copy letter to stationery/letterhead. Double check all hyperlinks.
- \* Upload a copy of the letter/email to their online profile.

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

This is a friendly reminder that you need to complete one or more of the following requirements to be a certified volunteer.

- OK 4-H Youth Development Orientation** (New applicant only) - <date>, <time>, <location>
- OSU/4-H Working with Minors Guidelines** – Complete online <hyperlink>, or in person <date>, <time>, <location>
- OCES Civil Rights for Volunteers** – Complete online <hyperlink>, or in person <date>, <time>, <location>
- Background Check** through Sterling Volunteer
- Other:**

[Paragraph for New Volunteer] We are committed to assisting our volunteers in completing the certification process within 90 days of enrollment. According to our records your enrollment must be completed no later than <date> or the enrollment may be deleted/cancelled.

[Paragraph for Returning Volunteer] We are committed to assisting our volunteers in completing the annual enrollment process no later than December 1. If your enrollment is not in “Active” status at that time you will not be allowed to work with youth unsupervised and protections provided by certification will be limited.

Please contact me as soon as possible as to how we can be of assistance. If things have changed and you are no longer interested in being certified, please notify the Extension office.

Sincerely,

<name>

Extension Educator

4-H Youth Development Programs

<email>

<phone>

ENROLLMENT–FINAL NOTICE **CERTIFICATION PROCESS INCOMPLETE**

- \* Edit/fill-in the blanks and send letter/email to volunteers who have not completed certification/enrollment process in a timely manner.
- \* Copy letter to stationery/letterhead.
- \* Upload a copy of the letter/email to their online profile.

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

Thank you for applying to be a certified 4-H volunteer. According to our records you have not completed the requirements noted in previous communications.

(Paragraph for New Volunteer) This communication is to notify you that your application will be cancelled/deleted in the enrollment system as of <date>. At a time more convenient, we welcome you to re-apply for certification.

(Paragraph for volunteers renewing enrollment.) This communication is to notify you that your enrollment will be rolled back to inactive/cancelled as of \_\_\_\_\_. As of this date you must be supervised/in the presence of an Extension educator and/or certified 4-H volunteer until which time all requirements are completed.

If you are still committed to being certified, please contact the Extension office before <date> and we will assist you in completing the process.

We hope you are still interested in joining our team and contributing to the growth the 4-H program.

Sincerely,

<name>

Extension Educator

4-H and Youth Development Programs

RECOGNITION: **ANNUAL CONTINUING EDUCATION REQUIREMENTS COMPLETED**

- \* Edit/fill-in the blanks and send letter/email to volunteers who **have completed** the required number of continuing education requirements to maintain certification.
- \* Copy letter to stationery/letterhead. Note there is a certificate of recognition which can be included. See Forms.
- \* Upload a copy of the letter/email to their online profile.

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

We recognize 4-H volunteers contribute many personal hours and resources to assist our members. Your cooperation and interest in the \_\_\_\_\_ County 4-H program is invaluable.

During the \_\_\_\_\_ program year, we recognize the investment made in your own personal development by attending the necessary number of continuing education opportunities. A new program year begins on August 1. Please see the attached list of continuing education opportunities scheduled for 20\_\_-\_\_.

On behalf of the \_\_\_\_\_ County 4-H program, thank you for investing your time and talents in the Oklahoma 4-H Youth Development Program.

Sincerely,

<Name>

Extension Educator, 4-H and Youth Programs

Attachments: Parent-Volunteer Continuing Education Schedule  
Renewal Certificate

RECOGNITION: **CONTINUING EDUCATION REMINDER**

- \* Send communication ½ - 3/4 of the way through the program year to those needing a reminder.
- \* Edit/fill-in the blanks and send letter/email to volunteers who have **NOT** completed the required number of continuing education requirements to maintain certification.
- \* Copy letter to stationery/letterhead.
- \* Upload a copy of the letter/email to their online profile.

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

This is a friendly reminder to maintain your status as a certified 4-H volunteer continuing education (CE) must be completed before July 1.

Two of the four continuing education credits are to be received at the county level. The other two credits can be attained at the county, district, or state levels, online, via webinar, or may even be professional development related to youth work/4-H subject matter offered by another agency. Any noted combination of continuing education is sufficient.

According to our records, you have not completed the necessary number of continuing education credits to maintain your volunteer certification. If you believe our records are incorrect or you have documentation of participating in a continuing education opportunity, please contact us at your earliest convenience. The Extension Office must have official documentation of participation in any continuing education not provided by our office no later than July 1.

To assist in keeping your certification current we have noted the remaining opportunities for this year.

Date	Time	Continuing Education Opportunity	Location	Registration Link
------	------	----------------------------------	----------	-------------------

We value the contributions you make to our members and program. Continuing education is our way to ensure volunteers are prepared to deliver timely and quality programs on our behalf.

Thank you for your support in providing our membership with a memorable 4-H experience.

Sincerely,

<Name>

Extension Educator

4-H and Youth Development

RECOGNITION: **CONTINUING EDUCATION NOT COMPLETED**

- \* Edit/fill-in the blanks and send letter/email to **volunteers not completing CE expectation.**  
Sent following the July 1 deadline.
- \* Copy letter to stationery/letterhead.
- \* Upload a copy of the letter/email to their online profile.

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

4-H offers opportunities for new friendships, personal growth and development, and the fulfilling experience of watching youth explore and develop in a positive and safe environment.

On \_\_\_\_\_ a letter/email was sent informing you that your annual continuing education credits had not been completed. Per the Volunteer Agreement completed as part of your enrollment, ***“As a 4-H VOLUNTEER I Agree: To annually complete a minimum of four (4) continuing education/volunteer trainings, ... or my rights, responsibilities, and status as a "certified" volunteer can be revoked.”***

Enclosed is a schedule of 4-H Parent-Volunteer continuing education opportunities scheduled for the next program year. We encourage you to mark these programs on your personal and family calendar(s). Each is an investment for your personal development and our 4-H members. Continuing education is a valued part of the volunteer certification process and a constructive expectation.

Thank you for your support in our effort to provide all members with an educational and memorable 4-H experience.

Sincerely,

<name>

Extension Educator

4-H and Youth Development Programs

Attachment:: Parent-Volunteer Continuing Education Schedule

# Oklahoma 4-H Volunteer Core Competencies

Competency	Behavioral Indicators
Communication Skills	<ul style="list-style-type: none"> <li>Effectively expresses ideas and facts concisely and in an organized manner through oral and written communication.</li> <li>Works well with 4-H members, parents, volunteers and extension staff.</li> <li>Practices active listening skills.</li> <li>Shares information in a timely and diplomatic way.</li> <li>Uses a variety of positive methods to promote 4-H and Cooperative Extension.</li> </ul>
Interpersonal skills	<ul style="list-style-type: none"> <li>Considers and responds appropriately to the needs, feelings and capabilities of others.</li> <li>Demonstrates good citizenship and treats others with respect and fairness.</li> <li>Exhibits patience in appropriate situations.</li> </ul>
Flexibility	<ul style="list-style-type: none"> <li>Is open-minded to new ideas, change, and new information.</li> <li>Adapts behavior and methods in response to new information, changing conditions and priorities, demands, unexpected obstacles, or situations.</li> <li>Demonstrates ability to compromise.</li> <li>Demonstrates flexibility due to change in conditions, priorities, demands or situations.</li> <li>Adapts leadership style to variety of situations.</li> <li>Adapts educational strategy for situation and audience.</li> <li>Encourages the development and use of imagination in the decision-making process.</li> </ul>
Decisiveness	<ul style="list-style-type: none"> <li>Exercises good judgment based on situation and surroundings.</li> <li>Makes sound, well-informed decisions.</li> <li>Perceives the impact of decisions.</li> <li>Commits to action to accomplish organizational goals.</li> </ul>
Initiative	<ul style="list-style-type: none"> <li>Motivated, self-starter.</li> <li>Committed to positive ethics in youth development – trustworthiness, respect, responsibility, fairness, caring, and citizenship.</li> <li>Follows through with projects and commitment.</li> <li>Works to develop an area of expertise.</li> <li>Recognizes own strengths and weaknesses and committed to personal improvement.</li> <li>Demonstrates belief in own abilities and ideas.</li> </ul>
Organizational Skills	<ul style="list-style-type: none"> <li>Effectively manages time, resources and people.</li> <li>Is prompt.</li> <li>Successfully manages multiple tasks.</li> <li>Uses conceptual and creative thinking in decision-making.</li> <li>Uses a proactive approach to problem solving.</li> <li>Uses a variety of educational tools (newsletters, presentations, tours, judging, news releases, displays, etc.).</li> <li>Evaluates strength, benefits and quality of educational programs.</li> </ul>
Service Orientation	<ul style="list-style-type: none"> <li>Effectively manages, develops and delivers educational programming.</li> <li>Is concerned with public perception and satisfaction.</li> <li>Is honest, trustworthy, fair, and dependable.</li> <li>Appearance and behavior is appropriate and professional.</li> <li>Works effectively with diverse audiences.</li> </ul>
Teamwork	<ul style="list-style-type: none"> <li>Offers assistance and is supportive of others.</li> <li>Gains satisfaction from group achievement.</li> <li>Demonstrates ability to work with diverse personalities.</li> <li>Maintains credibility with others.</li> <li>Coaches, mentors, and challenges peers and youth.</li> <li>Inspires, motivates and guides others toward goal(s) accomplishment.</li> <li>Actively involved and supportive of small group, club and county efforts.</li> </ul>
Institutional Systems	<ul style="list-style-type: none"> <li>Understands and appropriately applies procedures, requirements, regulations and policies as related to 4-H, Oklahoma Cooperative Extension, and the university.</li> <li>Supports and works effectively within the organizational and management systems of the local, county, and state 4-H programs.</li> <li>Supports the non-discrimination statement of the Oklahoma Cooperative Extension Service.</li> <li>Demonstrates commitment to positive youth development and education.</li> </ul>



# 20\_\_ - \_\_ Parent-Volunteer Continuing Education Survey

We would like your assistance in planning the Parent-Volunteer Education opportunities for the next program year. The committee wants to be sure that adult volunteer education is a quality educational experience for those providing leadership to our young people.

*The objectives of volunteer development:*

- create a fun and positive learning environment.
- provide structured learning experiences that can be used at the local level or in a family unit.
- provide an opportunity for learners (parents and volunteers) to interact with the information.

**Your Role** - (check all that apply)

- Club/CB Leader
- Assistant Club Leader
- 4-H Project Leader
- 4-H Activity Leader
- 4-H General Volunteer
- 4-H Teen Leader
- Parent
- Other \_\_\_\_\_

**What CE/training have you participated in this year?** (check all that apply)

- Orientation – New volunteer, OCES, Club Leader, project related, etc.
- Webinar
- Online learning management system.
- District/State/Regional Volunteer Conf
- Communicating through Project
- Have money...will SPEND
- Safety at Every Turn
- Putting the Piece Science

**Rank the following topics in order of importance.**

*Please feel free to write in suggestions.*

- Rally Day/Event for New 4-H Families
- Clubs with all the Right Stuff! Planning and Developing life skills through 4-H project work
- Getting the Most Out of Activities and Events
- Public Speaking
- Developing Teams
- Stress M and Volunteer
- Seeing the Wonder an Diversity
- Building Character through 4-H Project Work

Local Club  
 Edit this column so it reflects possible CE in for the next program year.

- Suggestions:**
- Hands on Local Club Activities in the Focus Areas**
  - Health Living
  - STEM
  - Civic Engagement & Communication and Expressive Arts

**Project Area Training: (list specific subjects)**

**Your Ideas**

Service Learning

**Suggestions:**

## Parent-Volunteer Development Opportunities

**All parents, volunteers and teen leaders are welcome.**

Certified Volunteers must attend 4 CEU's per year to maintain "active" certification status.

DATE & TIME	PROGRAM AND SUBJECT	LOCATION	INTENDED AUDIENCE
	We will be emphasizing planning project work and teaching methods and learning styles as they relate to developing projects, programs and activities.		
Online Training	<b>Working with Minors and OCES Civil Rights and Diversity for Volunteers</b>	<hyperlink>	Certified Volunteers
Online Training	<b>4-H/Extension self-study topics.</b> Must complete three sessions to qualify as one CE credit.		Certified Volunteers
August 17, 20__ 7-9 pm	<b>Orientation for New Volunteers</b>	Extension Office	New club leaders and project leaders
September 1, 20 6-7 pm	<b>Review of Working with Minors Guidelines</b>	Extension Office	New certified volunteers
September 26, 20	<b>Local Club Officer Training</b> – conducted by the County 4-H Officer team. Discover how the six pillars of character (trustworthiness, respect, responsibility, fairness, caring and citizenship) can help you have effective local club meetings.	Fairgrounds	4-H youth officers, parents and club leaders
October 5, 20 7-9 pm	<b>Review of OCES Civil Rights and Diversity for Volunteers</b>	Extension Office	New certified volunteers
October 16, 20	<b>“Project”ing the Future</b> Planning, developing, and reporting 4-H project work.	Extension Office	4-H parents, teens, and volunteers
October 24, 20 7-9 pm	<b>Field of Genes</b> Fun activities to teach youth and adults about the wonders and complexity of life, from the smallest one-celled protozoan to the multi-billion-celled human!	Fairgrounds	4-H parents, teens, and volunteers
November 14, 20 • 11:30 am - 1:30 pm Brown Bag Lunch or • 7-8:30pm	<b>New Volunteer Orientation</b>	Extension Office	New volunteers being certified
January 10, 20	<b>NE District Volunteer Conference</b>	TBA	4-H parents, teens, and volunteers
January 23, 20 7-9pm	<b>Communications</b> – is the key to our global society and opens the door to 4-H project work. Learn how to incorporate different forms of communications in public speaking, photography, computers and other projects.	Fairgrounds	4-H parents, teens, and volunteers
January 30, 20	Pork Quality Assurance Training	Extension Office	4-H youth, parents and project leaders
February 22, 20 • 11:30 am - 1:30 pm Brown Bag Lunch or • 7-8:30pm	<b>New Volunteer Orientation</b>	Extension Office	New volunteers going through certification
April 24, 20 7-9 pm	<b>Natural Resources</b> – through 4-H project work explore the great outdoors while learning to be an environmental steward. We will explore forestry; geology and Oklahoma wildlife – fish, birds, and wild flowers.	Fairgrounds	4-H parents, teens, and volunteers
June 26, 20 7-9 pm	<b>Kitchen Chemistry</b> – fuel that does the body good. Explore the 4-H Food Science program through hands on science experiments, cooking, posters, displays, and the meat science program.	To be announced.	4-H parents, teens, and volunteers

July 6, 20 7-9 pm	<b>4-H on TRAC</b> – Teams (of 4-H members, parents and volunteers) from each club will get on board and make club plans for next year.	Fairgrounds	4-H members, club leaders, parents/volunteers
June 16, 20	<b>State Parent-volunteer Conference</b>	Stillwater, OK	4-H parents, teens, and volunteers
November 6-9, 20	<b>Volunteer U – multistate conference on volunteerism</b>	Eatonton, GA	4-H parents and volunteers

Over

## Parent-Volunteer Association Quarterly Meetings

Parents and volunteers are invited and encouraged to participate in the PVA. County business and decisions regarding county activities and events are handled during these meetings.

DATE & TIME	LOCATION
August 17, 20 7-9 pm	Extension Office
November 21, 20 7-9 pm	Extension Office
February 20, 20 7-9 pm	Extension Office
June 19, 20 7-9 pm	Extension Office
August 21, 20	Extension Office

# VOLUNTEER POSITION DESCRIPTIONS

Download prepared position descriptions and/or template at  
<https://4h.okstate.edu/educators/volunteer-management-system/>.