

# Oklahoma 4-H VOLUNTEER MANAGEMENT SYSTEM



## **A Management System to Support the 4-H Youth Development Program**

Administered by the  
Oklahoma Cooperative Extension Service

Adopted 1998

Revised October 2017

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## PORTIONS OF THIS SYSTEM WERE ADAPTED FROM:

Purdue University Cooperative Extension Service. "Information and Instruction for Faculty, Staff and Volunteers Who Work with 4-H Youth Development Programs in Indiana."

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/units 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 two Land Grant Universities, Langston and Oklahoma State, with a 4-H Youth Development mission. OCES county offices and Extension educators are responsible for providing volunteer management system support for both university systems.

OCES Educators are responsible for having a 4-H volunteer and/or potential volunteer complete the procedures and electronic paperwork 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 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 4-H Program Specialist and District Director.

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) 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 individuals 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 ISOTURE model. The ISOTURE model supports individual growth and enhances 4-H's ability to address local challenges and opportunities.

The Volunteer Management system provides OCES with a structure for training and supporting staff that work with volunteers as an on-going part of their job responsibilities.

## PURPOSE OF THE OKLAHOMA 4-H VOLUNTEER MANAGEMENT SYSTEM

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- ✿ 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 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 each individual 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?

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A volunteer manager is an Extension educator. He or she 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 similar to 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 volunteers to be successful in their work. Success for the volunteer will mean success for the organization because they will continue to 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 organizations. 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 if you believe s/he has the ability to 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 to aim for is consistency between 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 what their responsibilities.
7. **Offer top-notch training.** The interview and placement process facilitates the right match between volunteers and 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 or start rumors or be guided by misinformation. Share information via social media, posting on a webpage, newsletters, meetings, minutes mailed to someone unable to attend a meeting, bulletin board, etc.
10. **Express your appreciation.** While a formal expression of appreciation is essential, continual and informal words and deeds of appreciation are equally valuable.

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. All Everyone Ready resources can be found at <http://www.4-h.org/resource-library/professional-development-learning/4-h-volunteer-development/>.



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.

## 4-H PROFESSIONAL AND 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. <https://4-h.org/professionals/professional-development/> (2017).



The national site houses resources organized under the following headings:

✿ **Volunteer Engagement and Recruitment:** Gain insight into how to engage and motivate volunteers with findings from these comprehensive, national studies. Then, use the promotional materials found in the Volunteer Recruitment Toolkit to attract and recruit new volunteers.

✿ **Preparing Volunteers to Make a Difference**

✿ **4-H 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.

✿ **Volunteerism for the Next Generation: Fact Sheet Series**

- |  |   |
|--|---|
| - Introduction to ISOTURE and Volunteerism PRKC  | - Education of Volunteers – Orienting, Educating, Adult Development and Learning Theory, Risk Management                              |
| - Infrastructure to Support a Volunteer Delivery System  | - Sustainability of Volunteer Efforts - Supervising and Coaching, Managing Performance, Recognizing Volunteers, Evaluating Volunteers |
| - Personal Readiness - Philosophy, Trends, Advocating  | - Management Volunteers (Green Taxi)  |
| - Organizational Readiness - Creating a Climate, Identifying Needs, Developing Volunteer Positions | - Review and Analysis of Volunteer Delivery System  |
| - Engagement of Volunteers – Recruiting and Selecting Volunteers                                   |   |

✿ **VRKC Model & Lesson Plans:** The Volunteer Research Knowledge Competencies Taxonomy is based on the identified skills and competencies that volunteers will need in order to effectively deliver 4-H Youth Development programs and activities in the next decade.

✿ **4-H Volunteer e-Forum**

## SEVEN PHASES OF THE VOLUNTEER MANAGEMENT SYSTEM – ISOTURE MODEL

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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 the volunteers working with 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 within the organization and 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 and selecting volunteer's best qualified (i.e. with appropriate knowledge, attitudes and skills) for identified volunteer opportunity(s).* A Volunteer Manager recruits 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) Starting September 1, 2016 Oklahoma 4-H will no longer accept paper applications. The volunteer will apply through *4HOnline®*.

An applicant's enrollment is not "approved" in *4HOnline®* until

- a. The application is reviewed by the 4-H Volunteer Advisory Committee (VAC) and approved or declined. Applicants accepted or declined must receive written notification (sample letter 2 or 3) and a copy of the letter is included in their electronic personnel file maintained in their *4HOnline* profile.
  - b. Background checks have been run and
  - c. The volunteer has completed the Oklahoma 4-H Youth Development Orientation, Working with Minors training and Title VII and IX Trainings.
3. **ORIENTATION:** *Orienting selected volunteers to the role expectations of the volunteer position and the organization as a whole.* 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 Training. The third phase of orientation is completing the Title VII and IX training. (2015) The date completed is recorded in *4HOnline®*.

The Extension Educator is responsible for sending the individual (sample letter 4) stating they are "officially" recognized as a certified volunteer with all right, privileges and responsibilities. Place a copy of the notification in the individuals electronic personnel file and record the date the correspondence was sent in *4HOnline®*.

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 opportunities to attain knowledge (human development and/or subject matter), attitudes (values and norms) and skills (technical skills) to improve the level and quality of performance. Role expectations are established and reinforced during training. Based upon the role/position description of the volunteer, the volunteer is now equipped and empowered to play an important role carrying out the 4-H mission. Training will be recorded in *4HOnline®* within the individual's profile.

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 involved in carrying out his/her new roles. 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."*
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 as agreed upon. Keep a copy of the signed "position description" and assessment in the volunteer's electronic file housed in *4HOnline®*.*

During the evaluation phase there is an opportunity to counsel and constructively guide individuals toward necessary personal and professional improvement as a 4-H volunteer. A written record of the session should be signed by both parties and placed in the volunteer's electronic file.

If a volunteer does not complete the necessary requirements and is placed on probation it will be noted on their profile in *4HOnline®*



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

# **Identify**



- |          |   |
|----------|---|
| <b>I</b> | <b>Identify: Identifying volunteer opportunities within the organization and developing appropriate written position descriptions for them.</b> |
|----------|---|
- 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 as a whole.
  - 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 (2012)

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

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

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

It is important that County Educators team with Clubs to recruit, certify and train multiple adult volunteers to work with any “one” 4-H clubs 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 or special interest group. *Requires certification*

**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**

**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). *Requires certification*

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

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

**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 particular Association being represented. *Generally requires certification, .ie. by setting the example.*

**Program Advisory Committee:** A community leader representative of the county's diversity in 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. *Generally does not require certification.*

**Foundation Board Member:** 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. *Generally does not require certification*

**Volunteer Advisory Committee:** Individuals who assist in screening and placing volunteers in the 4-H club program. *Generally does not require certification*

## **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 insure the University is 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 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 the:

- 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

These volunteers assist the 4-H program for a pre-established time and are truly finished when the job is done in the prearranged time frame. These individuals are under the supervision of certified volunteers and/or Extension educators.

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

Some episodic volunteers choose to assist or work on an annual event/activity each year or may be a community leader who serves on the Program Advisory Committee.

**Considerations and Practices for using Episodic Volunteers**

Position descriptions, training, orientation, supervision and sustaining 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 may not be 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.

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## 4-H VOLUNTEER POSITION DESCRIPTIONS

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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. Revised position descriptions (2015) and a template for club and county roles are posted online at <http://4h.okstate.edu/for-educators/volunteer-management-system>.

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 are you expecting 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, 2017

Dear Isobel,

Thank you for volunteering to assist with the Green County Speech contest on May 1, 2016. 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 [karla.knoepfli@okstate.edu](mailto:karla.knoepfli@okstate.edu) or returned the day of the event.

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



Karla Knoepfli  
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 as a whole.

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 to be adopted and practiced by County Extension staff in the screening, interviewing and hiring of volunteers.

The Extension educator is responsible for informing all persons with access to private information of the OCES confidentiality requirements. This includes County Extension educators, 4-H program assistants, support staff and any volunteers with access to volunteer applications and related materials. These persons shall be asked to sign the *Confidentiality Statement* (see **Forms**) agreeing to protect the privacy of applicants and volunteers.

As of September 1, 2017 all reference forms, applications, and notes are to be uploaded and maintained in the volunteers electronic file in 4HOnline®.

All information on an applicant and why they are accepted or denied must be kept confidential. Only the Volunteer Advisory Committee and County Extension educator should be involved in discussing an applicant's characteristics or background directly related to the position and the needs of the 4-H program. Strive to factor only truthful information into the analysis and take reasonable steps to keep all information confidential.

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

Never release the resulting information to people who have no legitimate need to the materials. 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 “Forms” section for VAC and Staff to sign.

## VOLUNTEER ADVISORY COMMITTEE

The Volunteer Advisory Committee (VAC) is responsible for:

1. Reviewing all volunteer applications.
2. Assisting in collecting additional information on applicants.
3. Recommending acceptance or denial of applicants.
4. Providing assistance in developing position descriptions with the aid of the Parent-Volunteer Association, Club Leaders, Foundation, Extension personnel, etc.

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 committee will recommend appropriate action based on one of more of the following: review of application, interviews and/or reference check. The Extension educator has ultimate responsibility for committee decisions; this includes decisions based on a committee's recommendation.

### VAC MEMBERSHIP

It is recommended that the committee be composed of at least two individuals who have experience in human relations, youth development or in screening and placing volunteers. Each committee member should be provided with the VAC Position Description and provided a VAC orientation. The Extension educator will chair the committee.

Annually county VAC members are recorded in *4HOnline*®.

The screenshot displays the 4HOnline® web application interface. At the top, there is a navigation bar with tabs: Enrollment, Connect, Finances, Data, and Quiz Bowl. Below this is a main menu with icons for Search, My Account, Managers, Clubs, Projects, Activities, Awards, Groups, Payments, Export, Confirm Volunteers, and Reports. The 'Groups' tab is selected, and the '4-H Year' dropdown is set to 'Current'. The search criteria are 'State: VAC - REQUIRED' and 'Current'. The search results are displayed in a table with columns for Role and Status. The Role column includes checkboxes for Adult, Contact, Custom, and Youth. The Status column includes checkboxes for Active, Archived, Inactive, Incomplete, Not Participating, Pending, and Short-Term.

### ORIENTATION FOR VAC

The purpose for the orientation process and periodic updates is to keep the VAC informed of appropriate screening, interviewing and reference practices. Volunteers are “employed” by OCES for “volunteer” roles. Additional information contained in the sections on screening applicants 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 when conducting the orientation.

VAC members should receive adequate information on the following topics:

1. Introduction of 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 <http://4h.okstate.edu/for-educators/volunteer-management-system>) 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 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, the entire certification process should be completed within three (3) months. (2017)

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

- Reviewing Application
- Sexual and Violent Offender Registry check
- Reference checks – forms for doing mail, phone and face-to-face reference checks are located in the Forms section of this manual.
- Personal interviews – Form for guiding interview process located in the Forms section of this manual.

Written minutes or notes should be kept of every VAC meeting and/or action. These should be filed 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 through 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.

Adults and teens that have the potential of working with youth unsupervised as leaders (club, project, teen, etc.), as a chaperone, who may be transporting children (other than their own), serving as a camp counselor or on a district/state leadership team, etc. must complete the certification process. To maintain certification as a 4-H volunteer in the Oklahoma 4-H program, these persons must complete the annual recertification requirements. This policy applies, but is not limited to the following:

- |  |   |
|--|---|
| ✿ Any person who works with children in a situation unsupervised (meaning, not in the presence of a paid OCES employee or an “active” certified 4-H volunteer) | ✿ Chaperones - county, state and out-of-state activities  |
| ✿ 4-H Parents  | ✿ Volunteers transporting youth (other than their own child) as a 4-H representative                          |
| ✿ General or At-Large 4-H Volunteers   | ✿ And any others who wish to seek a greater level of support, due process and protection from legal liability |
| ✿ Project/SPIN*, Activity, Club and Cloverbud leaders  |   |
| ✿ Teen Leaders and Camp Counselors   |   |
| ✿ District and State Leadership Team   |   |

\* SPIN refers to Special Interest. It is a new term being used to identify project clubs and project leaders. (2014)

### **WHO COMPLETES THE APPLICATION PROCESS TO BE CERTIFIED?**

- Any person who works with children in a situation unsupervised by a paid OCES employee or an “active” certified 4-H volunteer.
- Teen who wants to serve in a leadership role (i.e. Teen Leader, Camp Counselor, Officer, etc.)
- Chaperones for county, state and out-of-state activities
- Volunteers transporting youth (other than their own child) as a 4-H representative
- Community Citizen
- 4-H volunteer transferring from another state
- Volunteer certified by another youth serving organization
- Volunteer certified by a recognized organization or specialized field. This includes public school teachers
- 4-H volunteer designated as inactive with a lap of three years as “actively” certified with the Oklahoma 4-H program.

### **WHO DOES NOT COMPLETE AN APPLICATION?**

- Oklahoma 4-H “certified” volunteer transferring between counties. Follow protocol for transferring membership in 4HOnline®.
- 4-H Volunteers who have maintained their “active” status.

### **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 intend for “adult” volunteers. (Added 2012)

As with all certified 4-H volunteers, teens should have the same documentation on file when fulfilling a specific volunteer role such as camp counselor, club project leader, etc. Documentation provides liability protection under OSU policy.

## GENERATIONAL VOLUNTEERS (2015)

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We are typically familiar with three common forms of diversity: Ethnic, Religious and Racial. We accept them without question. In this day and time we must now be conscious of a fourth, generational diversity.

Generational diversity matters 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 Gen@.

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

1. Financial Stress
2. Technological Acceleration
3. Diversity of Population
4. Redefining of Family
5. MeBranding
6. Change in Work-Life Balance

## CERTIFICATION STEPS

1. **Potential Volunteer completes a *Volunteer Application*.** The application aids in gathering information and to verify instances where a legitimate question may arise as to the person's qualifications.

As of September 1, 2016 all adult applications are completed through 4HOnline® by the volunteer. *There is no paper application for adults and the county office does not enter the information.*

Teens cannot complete the “adult” application in 4HOnline®. Teen volunteers complete a paper application. The application will be uploaded to the teens electronic file in 4HOnline®.

2. **Communication** – The Extension educator sends correspondence to the applicant through each phase of the approval process. Sample correspondence can be found in the **Resources** section of the manual.

Application Received – Send notification (letter/email) acknowledging receipt of the application and an approximate date for notification. *Sample letter 1*

Approval of Applicant – Send notification of their approval and outline the remaining steps in completing their enrollment. *Sample letter 2*

Denial of Applicant – Send a simple notification, which states the 4-H organization did not find them compatible with our needs and services. *Sample letter 3*

Certification Completed – Send a “welcome to the family” notification. You may even wish to include a “Certification” certificate. *Sample letter 4*

Certification Process Incomplete – Applicant who does not complete certification steps should be **informed what happens to their application and enrolment at Rollover**. *Sample letter 5*

3. **4HOnline® Data Entry** - Follow ALL screen instruction for entering enrollment in 4HOnline. Do not approve any enrollment until all requirements are completed and forms/letters/notes/etc. are uploaded to the individual's profile.

a. Authorizations –signed

b. Teen (only) Application Uploaded

c. Run applicant through each registry

- National Sexual Offender Registry -

[http://www.nsopw.gov/\(X\(1\)S\(0wfkixfnhgwjves2cnaq2fyk\)\)/?AspxAutoDetectCookieSupport=1](http://www.nsopw.gov/(X(1)S(0wfkixfnhgwjves2cnaq2fyk))/?AspxAutoDetectCookieSupport=1)

- Oklahoma Violent Offender Registry - <http://vors.doc.state.ok.us/svor/f?p=101:5:0::NO::>

- Oklahoma Sex and Violent Offenders - <https://sors.doc.state.ok.us/svor/f?p=119:1:>

Volunteers working with some grant funded programs will be required to pass an OSBI background check.

- d. VAC – reviewed application, checked references, assisted with interview, etc. and approve/declined applicant
- e. Oklahoma 4-H Youth Development Orientation Completed
- f. Working with Minors Training Completed
- g. Title VII and IX Training Completed
- h. Volunteer notified by mail/email and correspondence uploaded to 4HONline.

Once ALL of these items are completed the individual is recognized as a “Certified 4-H Volunteer” in Oklahoma with all of the rights and responsibilities.

**All volunteers will be re-certified every 5 years.**

#### 4. Steps Extension Educator take in Processing an Applicant

Table: Abridge version of steps explained in detail, in the “Select” chapter of VMS.

<b>Initial Screening:</b> page 30, Reviewing application	<ul style="list-style-type: none"> <li>• Background check conducted/offender data base run.</li> <li>• VAC assists in running criminal checks, reviewing application and checking references.</li> <li>• References checked by mail, phone interview or face-to-face. (See Forms.)</li> <li>• Identify the applicants to interview.</li> <li>• Inform applicants they were selected/not selected to go forward with the interview process. (See Resources for sample letters 2 or 3.)</li> </ul>
<b>Pre-Interview Preparation</b>	<ul style="list-style-type: none"> <li>• Determine date, time and location to conduct interview with a member(s) of the VAC. Location should be free of interruptions.</li> <li>• Keep the applicant informed the process is proceeding and that they have a scheduled interview.</li> <li>• Determine what additional information needs to be obtained based on the application content. Use the position description to develop additional questions. Organize thoughts and questions to maximize time with the applicant.</li> <li>• Determine the information you need to prepare and provide during the interview.</li> <li>• Review the do’s and don’ts of interviewing.</li> </ul>
<b>Interviewing</b>	<ul style="list-style-type: none"> <li>• Conduct a professional interview. 4-H is being interviewed just as much as the applicant in this formal process.</li> <li>• Carefully assess the applicant's abilities, interests and commitment ensuring the interview questions and scenarios are legal and appropriate.</li> </ul>

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	<ul style="list-style-type: none"> <li>• Be straightforward about expectations and requirements to serve as a certified volunteer in Oklahoma.</li> <li>• Complete interview form/notes immediately following the interview and file with other documents. Upload to personnel file in 4HOnline.</li> </ul>
<b>Post-Interview</b>	<ul style="list-style-type: none"> <li>• Formally notify the applicants of their selection or elimination in writing. (See Resources for sample letters.)</li> </ul>

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## REVIEWING VOLUNTEER APPLICANTS

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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 trainable 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 training 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:

**Identification** – Individual’s legal name, as well as “home” address(s) for the past five years which can indicate a *pattern* for moves.

**Qualifications/Experience** – This information will communicate 4-H background, experience working with youth and adults in other organizations (education, training, licenses, etc.) The organizations, supervisor, address and telephone numbers assist in verifying information.

**Background and References** – Application will ask for convictions for criminal offenses or serious motor vehicle violations. References should be individuals who have known the person for a period of time and can speak in regard to the qualities they bring to the position. References should not be relatives.

**Waiver/Consent** – This is a statement that the applicant verifies that what is reported is true, authorizes the organization to check references and waives any rights to confidentiality, as well as states the procedure the organization uses to check criminal history, references, residency and employment.

**Signature and Date**

## WHAT TO LOOK FOR WHEN REVIEWING APPLICATION?

Screening applications 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.

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 References:

**The Staff Screening Notebook: 10 Steps to quality staffing** <http://www.nonprofitrisk.org/Default.asp> (2017)

**Corporation for National & Community Service Resources:** <http://www.nationalservice.gov/programs> (2017)

- Beyond Police Checks: The Definitive Volunteer & Employee Screening Guidebook
- Guidelines for the Screening of Persons Working with Children, the Elderly, and Individuals with Disabilities in Need of Support
- Screening Volunteers to Prevent Child Sexual Abuse: A Community Guide for Youth Organizations
- Screening Applicants

*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.*

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.*

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 could be considered an unwarranted risk for working with children because there is no known cure for pedophilic tendencies. (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.

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## GETTING ADDITIONAL INFORMATION FROM THE INITIAL APPLICATION

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### **Child Abuse – look and listen for...**

Examine how the applicant relates to children and also consider the nature of his/her peer relations. Many child molesters will have extremely limited contact with members of their own peer group.

The following are some "key questions" to be asked of applicants who seek to work with children. They have been adapted for this publication.

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li>• <b><i>Why are you interested in this position?</i></b> Be alert for someone who over identifies with children, is unduly excited about the possibility of working with children, or emphasizes that working with children is much easier than working with adults.</li></ul> | <ul style="list-style-type: none"><li>• <b><i>How would you describe yourself?</i></b> Be alert for someone who indicates shyness or is withdrawn or passive.</li><li>• <b><i>Please tell me about a situation in which you were responsible for disciplining a child, other than your own.</i></b> Listen for use of excessive force, denigration of the child, unrealistic expectations about children's needs, or use of discipline techniques that would violate your organization's policies.</li></ul> |
|--|--|



- ***What is there about children that make you enjoy working with them?*** Listen for over identification with children, statements that young children are "so easy to work with," or negative statements about teenagers or adults compared with younger children.
- ***What is there about this position that appeals to you most?*** Listen for appropriate skills, qualifications, etc. Also be alert for high interest in one-on-one activities with children, preference for a particular age and gender of child, and idealized statements about "saving children."
- ***In what kind of supervisory style do you prefer to function?*** Be alert for an applicant's preference to be left alone to do his or her "own thing." Also use this opportunity to explain

the monitoring and supervision techniques used to promote the safety of the children in the program. The applicant should understand that there is zero tolerance for any form of child maltreatment within your program.

- ***What was your childhood like?*** This question is intended to help discover if the applicant was subjected to abuse as a child. If so, there may be an elevated chance that he or she could be abusive. Individuals who were abused as children and who have resolved their victimization can make excellent volunteers and provide positive role models for children. However, applicants who appear not to have resolved their own childhood victimization should be screened out of unsupervised contact with children.

### **Personal Prejudices - look and listen for...**

As a government entity, 4-H Youth Development programs are intended to educate and serve the clientele of our communities. Volunteers for our organizations must be able to interact positively with people from diverse ethnic, cultural, and religious groups. Extreme views concerning these groups or personal belief systems that may encourage conversion to their way of thinking may interfere with our organization's mission. The following questions are designed to probe applicants' prejudices. Sensitivity must be exercised to avoid exclusion for reasons not allowable.

- ***Can you tell me about any experiences you may have had working with members of minority groups?*** Members of minority groups can be asked about their experiences with other minority groups. This question is intended to open the topic to discussion. You may want to focus on a particular minority group if the organization serves a concentration of that particular group.

- ***Have you ever had a negative experience with a member of a particular ethnic group?*** This is a follow-up question to the first and provides an opportunity for probing into what the nature of such an experience might have been and if it created any generalized feelings about any group.
- ***Are there any words that you use regularly that could be offensive to a member of a minority group or person of the opposite sex?*** This

question addresses the sensitivity of the applicant to unconscious biases as reflected in speech patterns. Some applicants may admit to using such language but try to justify its use by saying that it really does not mean

anything. If an applicant routinely uses demeaning terms to refer to minority groups or to the opposite sex, the words used probably do reflect an underlying attitude.

## **Criminal History - look and listen for...**

The following questions may be helpful to examine applicants' possible criminal history as related to position requirements.

- ***Have you ever been convicted of a criminal offense, including criminal driving violations?*** The answer to this question may be subject to verification by checking law enforcement records. Addressing the subject during the interview provides an opportunity for applicants to explain their side of the story and describe any mitigating circumstances. For example, a misdemeanor offense during college may not have any bearing on a senior citizen's character. A pattern of criminal behavior has stronger predictive value.
- ***Are you required by either federal or state law to register as a sex***

***offender?*** Most states now have sex offender registries that are more accessible to community-serving organizations. Asking this question may put the applicant on notice that this aspect of his or her life may be subject to further scrutiny. Look for any unease exhibited by the applicant when this question gets asked.

- ***Have you ever held a position in which you were required to be bonded and the bond was refused or revoked?*** This could indicate financial problems for which a bonding company found reason to believe that the individual should not have responsibility for handling someone else's funds.

## Driving History - look and listen for...

An applicant's driving practices are relevant for any position requiring operation of a vehicle. This may include transporting people to and from program activities or transporting goods or materials. Some nonprofits consider serious driving violations to be indicators of poor character or judgment. The following questions are typical of the ones that you should ask concerning motor vehicle operation.

- ***Have you ever been convicted of driving under the influence of alcohol or other drugs?*** This question may reveal a substance abuse problem that extends beyond driving.
- ***Have you received any traffic tickets or had any automobile accidents in the past two years?*** This question is intended to help explore the applicant's driving skills. It may also reveal immaturity and lack of judgment.
- ***Describe the kind of driver you are.*** This is a follow-up question to the previous one. Look for specific traits such as always fastening safety belts (the law in Oklahoma), never driving after consuming alcohol, obeying the speed limit, no texting/cell phone use while the car is in motion and never having wrecked a vehicle. This may be a good time for the interviewer to explain the organization's policy, if one exists, about checking the DMV records of individuals prior to placement.
- ***Have you ever operated the kind of vehicle that we own?*** Driving the organization's particular piece of equipment (school bus, van, trailer, truck, ATV or tractor) may be different from driving the three-passenger compact that the applicant uses each day. At the very least, the organization would want to supervise the applicant closely until he or she was completely familiar with the organization's vehicle.
- ***Do you currently own an automobile? If so, are you licensed and adequately insured? Who is your insurance company?*** Many jurisdictions require car owners to have automobile insurance. Not having insurance or being part of an assigned risk pool could be a clue to unsafe driving practices. Not only are these questions good for screening, but they also help the organization protect itself.

Once the application screening process is complete the committee can move forward with interviewing/checking references and interviewing applicants.

## INTERVIEWING APPLICANTS

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Interviewing is the second step in placing qualified applicants. Because of the sensitive nature of conducting interviews 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.

### A Note on Interviewing and the Law

The vast majority of interviews contain some opportunity for legal action because of a lack of preparation, interview questions which are unrelated to the job in question, and failure to use a structured interview plan that gives reliable interview information. In addition, legal guidelines indicate that the interview is regarded as being a test. An interview will be evaluated in a courtroom in the same manner that any test would be evaluated.

Because the interview is a test, it is important for it to have the positive qualities associated with a “good” test. The first of these characteristics is reliability. Interviews must generate consistent information for decision-making, even though different interviewers may be doing the same interview. In order to have a reliable interview, it is important that interviewers use a structured process. This means that you, the interviewer, should have a series of preplanned interview questions that are tied to specific job requirements. It is essential that you gain meaningful information about the person’s ability to do the job. Using a structured interview and seeking behavioral examples is quite different from relying on your *gut feeling*. In fact, reliance on your gut feelings will probably create an unreliable interview, which could create legal problems.

A second consideration is validity. Validity means that the interview measures an applicant’s skills for a specific job. Stated in another way, does the interview generate information that will predict job performance? A valid interview:

1. Is based on a job analysis/job description,
2. Contains questions which will provide information on job-related skills,
3. Systematically relates interview information to a specific job.

In the case of *Weiner vs. County of Oakland* (1976), questions, which would reflect bias, were ruled as illegal. Consequently, it is very important to avoid questions which would reflect bias or special sensitivity to persons because of their race, religion, age, handicap, color, sex or national origin.

Laws relative to employment interviews deal primarily with “protected classes,” which include persons who can be identified because of age, handicap, race, color, religion, sex or national origin. It is especially important to use a reliable and valid selection process when dealing with any individual who falls into a protected class.

Even the well-planned interview can be legally questioned. Interviewers should strive to conduct an interview, which is both reliable and valid, as well as develop a positive relationship with the interviewee. This relationship can communicate an interest in fairness and develop an understanding of skills needed for a specific position.

Source: Paul C. Green. *More Than a Gut Feeling III Training Leader’s Guide*. West Des Moines, IA: American Media Inc., ND, 14-15. [www.trainingsolutions.com/pdf/gut3lg.pdf](http://www.trainingsolutions.com/pdf/gut3lg.pdf) (2015)

Interview preparations began in the previous section when applications were being screened. During the screening process the VAC began formulating questions unique to the candidate and the position.

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 training.

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## PREPARATION – BEFORE, DURING, AFTER

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### BEFORE THE INTERVIEW

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

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|---|---|
| <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</li></ul> | <ul style="list-style-type: none"><li>questions related to the 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> |
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### DURING THE INTERVIEW

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

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| <ul style="list-style-type: none"><li>• Conduct a professional interview. 4-H is being examined just as much as the applicant in this formal process.</li><li>• 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."</li><li>• Follow the line of questions prepared in advance ensuring the interview</li></ul> | <ul style="list-style-type: none"><li>questions and scenarios are legal and appropriate. Give the applicant time to answer questions. Be flexible to the tone and atmosphere of the interview.</li><li>• Listen carefully, assess the applicant's abilities, interests and commitment. Record thoughts, impressions and responses on the "Interview Form" for future reference.</li></ul> |
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| <ul style="list-style-type: none"> <li>• 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.</li> <li>• Encourage questions.</li> </ul> | <ul style="list-style-type: none"> <li>• As necessary, suggest other positions which may be suitable or of interest.</li> <li>• 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.</li> <li>• 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.</li> </ul> |
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## **AFTER THE INTERVIEW**

As soon as possible following the interview determines whether the individual will be “hired” as a volunteer, followed by a timely notification in writing.

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| <ul style="list-style-type: none"> <li>• Summarize interview notes (See Forms) immediately following the interview.</li> <li>• In cooperation with fellow VAC member(s) answer the following statements about observations and information heard:             <ul style="list-style-type: none"> <li>– Ability to listen attentively and hear accurately</li> <li>– Experience as a volunteer</li> <li>– Knowledge of volunteer positions available</li> <li>– Ability to speak clearly and explain things well</li> <li>– Capacity to recognize individual strengths and potential</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>– Interested in serving the 4-H organization and supporting our mission and objectives.</li> <li>– Experience in working with people of varied racial, religious, education and economic backgrounds</li> <li>– Any indicators of potential risks or concerns</li> <li>– Training the individual will need</li> <li>– Special skills or talents the volunteer will bring to the program</li> <li>• Does the VAC agree that the individual is an appropriate fit for the 4-H program and position?</li> <li>• Formally notify the applicants of their selection or elimination in writing. (sample letters 2, 3).</li> </ul> |
|--|--|

## **AN EFFECTIVE INTERVIEW/ER**

### **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 up 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**

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| <ul style="list-style-type: none"> <li>• Prepared – You are a representative reflective of the 4-H program.</li> <li>• Familiarity with the programs and the organization</li> <li>• Honest and straight forward with the applicant, no surprises later.</li> <li>• Ability to converse easily with strangers</li> </ul> | <ul style="list-style-type: none"> <li>• Ability to efficiently guide the conversation without sacrificing sensitivity or purpose</li> <li>• Skill in observing or sensing other people's reactions, attitudes, concerns, personality traits and backgrounds</li> <li>• Acceptance of all people</li> </ul> |
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#### **AVOIDS COMMON ERRORS**

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| <ul style="list-style-type: none"> <li>• Asking questions which have an obvious, preferred answer</li> <li>• Making decisions too early in the interview</li> <li>• Following a stereotype pattern of interviewing without recognition of individual differences</li> <li>• Lacking knowledge or ability to explain the job expectations and requirements</li> <li>• Letting pressure of duties shorten the interview time or rush the applicant</li> <li>• Doing more talking than listening</li> <li>• Failing to direct the interview and thereby wasting time</li> </ul> | <ul style="list-style-type: none"> <li>• Not knowing what to look for</li> <li>• Tending to be overly influenced by individual factors such as personal traits rather than considering the person as a whole</li> <li>• Lacking skill in asking questions or probing more in-depth staying within the scope of the law</li> <li>• Failing to describe the job and organization in sufficient detail</li> <li>• Tending to be too routine instead of adapting each interview to the individual</li> <li>• Being interviewed by the candidate instead of leading the interview</li> </ul> |
|--|---|

*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:**

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| <ul style="list-style-type: none"><li>• Tell me more.</li><li>• Oh?</li><li>• Can you be more specific, please?</li><li>• Why do you think (say) that?</li><li>• Really?</li><li>• That's interesting.</li><li>• What is your plan?</li></ul> | <ul style="list-style-type: none"><li>• Explain what you mean by...</li><li>• What would happen if . . .</li><li>• What do you think about that?</li><li>• Can you give me an example?</li><li>• Would you go into more detail about that?</li><li>• I'd really like to know more about that.</li></ul> |
|---|---|

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:**

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|---|--|
| <ul style="list-style-type: none"><li>• Did that make you happy?</li><li>• Where do you work?</li><li>• Have your children been in 4-H?</li><li>• Do you have a plan?</li><li>• When did that happen?</li><li>• Are you supportive of...?</li></ul> | <ul style="list-style-type: none"><li>• That was good!</li><li>• I've heard what I wanted/needed to hear.</li><li>• This happened in what year?</li><li>• Did you accomplish your goal?</li><li>• Did you ever...?</li><li>• Do you do too much?</li></ul> |
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**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:

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| <ul style="list-style-type: none"><li>• We usually do not place women (men) in this position. How do you think you'll relate to the clientele?</li><li>• How does your spouse feel about this type of position?</li><li>• Are you married?</li><li>• Do you have plans to begin a family?</li><li>• How many children do you have?</li><li>• What are the ages of your children's?</li></ul> | <ul style="list-style-type: none"><li>• What are your childcare arrangements?</li><li>• We know you have elderly parents. How do you plan to take care of them?</li><li>• Do you own or rent your home?</li><li>• What is your birth date?</li><li>• When did you complete elementary or high school?</li><li>• Where were you born?</li></ul> |
|--|--|



- 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



As with current acceptable practices the county Extension educator is responsible for discussing confidentiality requirements with each authorized person reviewing or handling any membership information. All information is to remain confidential.

As of September 1, 2017 all-volunteer records will be housed electronically within the individual's profile in 4HOnline®. Paperwork (reference check, interview forms, etc.) and correspondence will be scanned and uploaded

into the designated field as one (1) PDF document in 4HOnline.

Prior to September 1, 2017, counties were to scan and upload all existing paperwork, negating the pre-existing requirement of locked file cabinets. Instruction for maintaining online files are contained in the 4HOnline data base.

## MANAGING VOLUNTEER PERSONNEL FILES THROUGH 4HONLINE®

**Applicant** - As a profile is created in 4HOnline®, an electronic file is created for the individual. The profile includes a field to upload all emails, correspondence, reference checks and any other documentation (as a single PDF document). Follow the step-by-step directions in the 4HOnline®.

Flag Options

Add Flagged

Add Family

Email to Flagged Members

Email to Search Results

MEMBERS/VOLUNTEERS											
Name	V	Years	Member #	Status	4H Age	Role	Gender	Primary Club	Enrollment	Approved	Login
Boots, Dan		1	0	Inactive	6	Youth	Male	Red River Shooting Sports	May 18, 2015		Login
Tulip, Bulb	V	2	1334520	Archived	34	Adult	Male	McKinley High	Sep 23, 2015		Login
Tulip, Daisy		1	0	Inactive	14	Youth	Female	Tailwaggers	May 17, 2015		Login
Tulip, Orange		1	1334538	Inactive	7	Youth	Male	Tailwaggers	May 17, 2015	Aug 06, 2015	Login
Tulip, Pink		5	1369190	Active	14	Youth	Female	Blazing Saddles	Sep 03, 2015	Sep 25, 2015	Login
Tulip, Red		10	1256689	Incomplete	18	Youth	Male	4-Leaf Clover Sr	Sep 02, 2015		Login

Once the individual has been screened (background checks), interviewed, approved by the VAC and completed all three required trainings their enrollment is "approved" and the profile will go from "Pending" to "Active."

**Certification Denied or Revoked** – Upload one electronic document of all paperwork and correspondence for applicants denied certification. **Do NOT “Accept” the enrollment in 4HOnline.** Contact the state office to “Archive” the enrollment. The profile and documents will be kept indefinitely. If the individual applies to volunteer somewhere else in OK 4-H, the files can be obtained through 4HOnline®.

The applicant/volunteer is not privy to their file or **materials collected or provided by others including references, interview notes or committee minutes.** The individual is privy only to the information they provided on his/her application. If a volunteer transfers to another county the file will be transferred to the new county by the county educator, not through the volunteer. Never provide the volunteer a copy of their personnel records.

Electronic files are not visible to the volunteer. County, district and state staff have access to the electronic records.

**Certified Volunteers** - All volunteers must be re-certified every 5 years. This is a prudent risk and liability practice. The system is set to automatically generate the “Application” portion of the enrollment system at programed intervals.

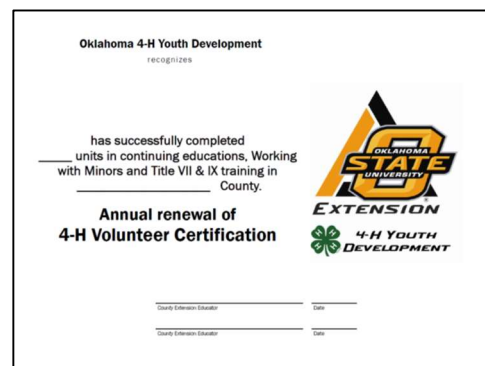
As of 2015 all certification requirements will be recorded and maintained in the 4HOnline® data management system. The system provides locations to record training and attendance at PVA meetings. There are fields for uploading forms, agreements evaluations, correspondence and/or documentation.

Club leaders and Cloverbud leaders are to annually sign the appropriate Position Description and Agreement (2015). The signed document is to be uploaded in 4HOnline before enrolment is “Accepted”.

All membership in 4HOnline® goes inactive on September 1. Part of the re-enrollment process is looking at the previous year’s online records for Training and PVA attendance. Recognize those who complete the requirements with a certificate.

If the volunteer did not complete the requirements necessary for “re-certification,” the volunteer may be placed on probation. (See example of 4HOnline screen shots.) The Extension office is responsible for informing the volunteer why they were placed on probation and what must be done to have it removed from their record. Upload a copy of the correspondence (sample letter 8 and 9) provided the volunteer. \*\* Additional information on “probation” is contained in chapter titled “Evaluation.”

Periodically during the year, the county office is responsible for running report(s) of “*Certification Requirements for Active Volunteers.*” The report will indicate completed training, continuing education, annual assessment, etc. Inform active volunteers who have not completed the certification requirements (letter 7) that “\_\_\_\_\_requirements” must be completed before August 1. Provide them a list of future opportunities.

The image shows a certificate template for Oklahoma 4-H Youth Development. At the top, it says "Oklahoma 4-H Youth Development recognizes". Below this, there is a line for a name, followed by "has successfully completed \_\_\_\_\_ units in continuing educations, Working with Minors and Title VII & IX training in \_\_\_\_\_ County." To the right of this text is the Oklahoma State University Extension logo, which features a stylized 'O' with 'OKLAHOMA STATE UNIVERSITY' and 'EXTENSION' text, and a green four-leaf clover with '4-H YOUTH DEVELOPMENT' text. Below the main text, it says "Annual renewal of 4-H Volunteer Certification". At the bottom, there are two lines for signatures: "County Extension Educator" and "Date", each followed by a blank line for a signature and a blank line for a date.

Member/Volunteer List				
	Name	Role	Membership ID	Enrollment Status
1)	Count Vladimir Munster	Adult Volunteer	1745302	Active
	<div> <div>✓ Volunteer Screening</div> <div>Approved (2016-2017): Other Restrictions</div> </div>			
2)	Eddie Munster	Youth	1454188	Active

Example of probation noted on personnel record.

VOLUNTEER SCREENING								
Year	Form Number	Screening Status	Fee	Bill	Export	Export Date	Comment	Edit
2016-2017	28727	Approved	N/A	N/A	2	Aug 10, 2017	Placed on probation September 2017 because he did not complete re-certification requirements the previous year.	Edit

**“Inactive” Volunteers** - A volunteer’s record will automatically be “Archived” if they do not re-enroll after one year with the enrollment status of “Inactive.” The individual can be re-activated by the county office.



**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 as a whole.**
- 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, the Volunteer Manager has made sure that a volunteer comes to the organization with the right qualification and an 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 training volunteers for the job(s) to be encounter while serving 4-H. As a volunteer maintains their affiliation with 4-H over an extended period of time the Extension educator's role will shift from trainer to teacher, then coach and mentor.

There are three required orientations/trainings 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 new recruit.

Each PowerPoint presentations, with notes, have been provided to assist the Extension educator in conducting the training. The presentation can be presented in person or online. Each session will take 1-1 ½ hours when conducted with a group. In the event an orientation is conducted one-one the same information must be discussed with the volunteer.

**Always be sure the volunteer is participating in the latest training.** The "Initial" training of Working with Minors and Title VII and IX are not to be repeated in subsequent years. The volunteer is to participate in other published forms of these trainings (2017).

The *Oklahoma Youth Development Orientation* (revised 2017) is designed as an overview of 4-H Youth Development for new volunteers **and those being re-certified**.



will last 1-2 hours. Be upfront and honest about the program and expectation. In the event that an orientation is conducted one-one, the same information is to be presented.

**4-H Youth Development Orientation** - PPT with notes is located at <http://4h.okstate.edu/for-educators/volunteer-management-system/powerpoint-orientation-and-wwm-training>. (revised 2017)

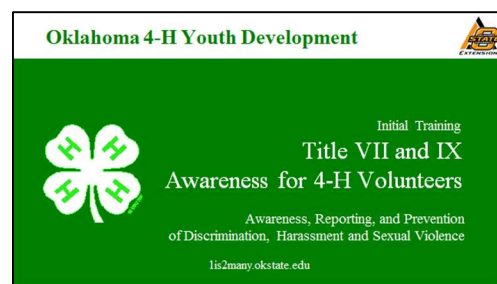
All counties are to use the primary information provided in the orientation. Opportunities have been built into the presentation for localizing information. A county will need to personalize designated slides and content prior to conducting the training.

**Initial Working with Minors Training** – the WWM training with notes is located at <http://4h.okstate.edu/for-educators/volunteer-management-system/powerpoint-presentations>. (revised 2017) A recorded self-study, with quiz, is available through 4HOnline (2017).





Beginning in the fall of 2015 all volunteers must complete the training ***Initial Title VII and IX Awareness for 4-H Volunteers***. The PPT with notes is located at <http://4h.okstate.edu/for-educators/volunteer-management-system/title-vii-and-ix-training-for-volunteers>. A recorded self-study, with quiz, is available through 4HOnline (2017).



## OTHER ORIENTATIONS

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



An orientation for new families and parents - PPT 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 2017).

PowerPoint and teaching outline for County Educator conducting "back to school" or "beginning of the year" meeting/orientation for club leaders. <http://4h.okstate.edu/for-educators/club-management-system/club-leader-fall-orientation-meeting> (revised 2017)

Links to other supporting resources:

- [Resources for Club Meetings](#) - club officer guides, parli-pro information, etc. <http://4h.okstate.edu/literature-links/lit-online/leadership-development/leadership-development-1>
- Volunteer Development Fact - <http://4h.okstate.edu/literature-links/lit-online/others/volunteer>
- 4-H On TRAC - resources and forms <http://4h.okstate.edu/for-educators/club-management-system/4-h-on-trac>
- Club and Cloverbud Leader Position Description and Agreement <http://4h.okstate.edu/for-educators/volunteer-management-system/volunteer-position-descriptions-2015-revisions>







## **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 as a whole.
- 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, learning new information, improving skills, preparing for more responsibility, being involved in teaching others, adapting to change, understanding context and theory 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 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 lessons.

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 your 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.)

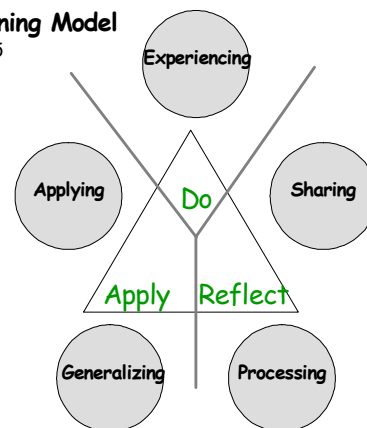
Volunteers will continue to improve and grow through your educational efforts as an instructor and coach. It is the Extension educator's responsibility to "continually assess" the work environment, both things and people, to ensure that it enhances productivity. Do all of these things with this end in

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*

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 volunteers 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. Explain why it is important that they understand and master the information or skill as a volunteer/parent. Then use appropriate activities to teach the

**Experiential Learning Model**  
Pfeiffer and Jones 1985



7

information. 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.

### 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
- 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 and subject matter. To effectively provide a quality experience (blend of information and activity), it is strongly encouraged that continuing education/training be 1-2 hours in length.

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

*John Cotton Dana*

Renewing Working with Minors and Title VII & IX training do not count toward four Continuing Education credits.

## 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 hour) 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.

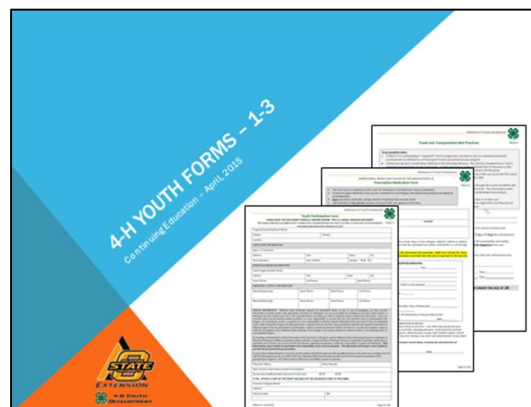
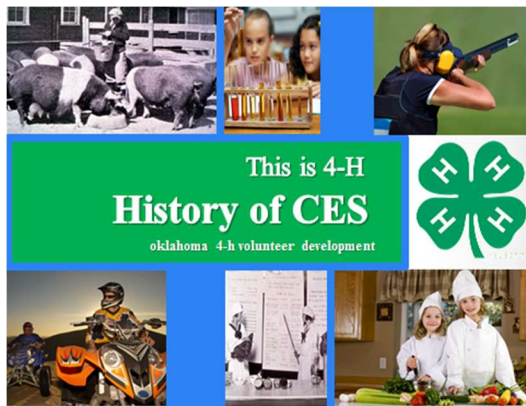
The other two volunteer continuing educational opportunities may take place at the

- County, district or state level,
- On-line CE will be made available through 4HOnline beginning in 2017.
- Professional development related to youth work and/or
- Subject matter relevant to the individual’s position in the 4-H program.

The volunteer must provide documentation to the county Extension office so it can be recorded in the individual’s profile in 4HOnline®.

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 Lowther

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.

In 2014 Working with Minors (WWM) and in 2015 Title VII & IX training were made mandatory by the University. In 2017 the University granted 4-H permission to merged the two trainings for **returning volunteers only**. Volunteers will get ½ of each training every other year. Example: Odd year, training includes ½ WWM and ½ Title IX content. Even year, the volunteer gets the other ½ of each training. **The merged trainings CANNOT be used with new volunteers or those being re-certified.** New volunteers and volunteers being re-certified must complete the full version of each. Below is a table illustrating volunteer/educator status and the required training.


	Full WWM Course	Full Title VII & IX	Blend of WWM & Title IX (Even yr. version)	Blend of WWM & Title IX (Odd yr. version)
New Volunteer	With Extension Educator or through 4HOnline Training	With Extension Educator or through 4HOnline Training		
Volunteer being Re- Certified	With Extension Educator or through 4HOnline Training	With Extension Educator or through 4HOnline Training		
Certified Volunteer re-enrolling			With Extension Educator or through 4HOnline Training	With Extension Educator or through 4HOnline Training
OCES Employee	OSU Learning Management System. <a href="https://hr.okstate.edu/training-and-development">https://hr.okstate.edu/training-and-development</a>	OSU Learning Management System. <a href="https://hr.okstate.edu/training-and-development">https://hr.okstate.edu/training-and-development</a>		

Oklahoma 4-H Youth Development  
recognizes

\_\_\_\_\_ has successfully completed  
\_\_\_\_\_ units in continuing educations, Working  
with Minors and Title VII & IX training in  
\_\_\_\_\_ County.

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



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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

All continuing education is recorded on the volunteer's profile in 4HOnline®.

The Extension educator should recognize volunteers who maintain their certification status each year. See the chapter on "Recognition."

Volunteers who do not complete the required training may need to be placed on probation. Probation is covered in the chapter on "Evaluation."



## **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 as a whole.
- 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

In chapter 3 of **4-H Century III: A Model for Oklahoma 4-H, Developing a Model Leadership Structure** the focus 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.

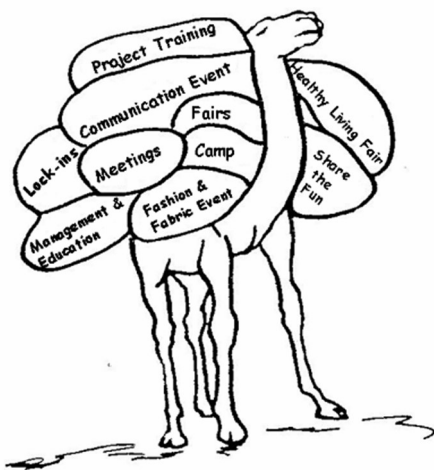
Volunteers are a rich source of knowledge and experience. The potential “skills” of volunteers usually exceed that of which any Extension educator can personally provide. A community of informed and trained volunteers can make better decisions than an Extension educator would make alone. Increased program 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.



## 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” volunteers. The professional is now read 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.



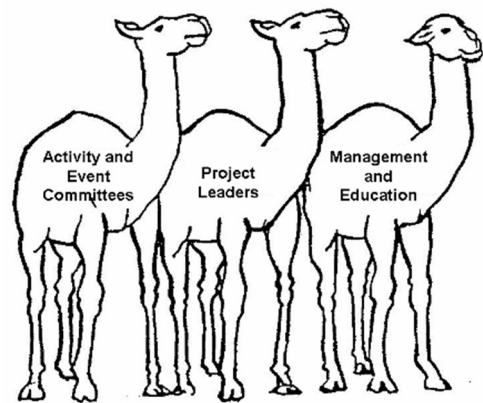


## SHIFTING FROM EDUCATOR TO MANAGER

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 implies 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.
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 all volunteers, committees and organizations with 4-H Volunteer Position Descriptions.
- Be 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.

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 are you expecting 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.

General **County 4-H Volunteer Position Descriptions** and a template are posted at <http://4h.okstate.edu/for-educators/volunteer-management-system>. 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 actually become a Project, Activity or even an assistant 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.

<b>County Extension Educators</b>	<p>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 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. <b>Responsible for the approval of youth and adult enrollment and 4-H Program Fee Transfer.</b></p>
<b>Para-Professional</b> (Role as of January 2006 – list not all inclusive)	<ul style="list-style-type: none"> <li>• 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.</li> <li>• Assist with the coordination of Extension (FCS, 4-H, Ag, Horticulture, RD) meetings and programs by gathering and organizing resources and materials.</li> <li>• 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.</li> <li>• Assist with marketing and visibility of OCES in schools and with other organizations/audiences.</li> <li>• 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.</li> <li>• Program Assistant may chaperone youth as a certified volunteer. Program Assistant is not to chaperone 4-H events as a staff member.</li> <li>• 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.</li> <li>• As requested, attend club and association meetings to maintain a working knowledge of programs and decisions related to OCES affiliated groups.</li> <li>• Assist Extension Educator with correspondence, newsletters, press releases, and yearbooks. Extension Educator has primary responsibility for the content and editing of publications.</li> <li>• Assist Extension Educator with livestock show and fair management (take entries, help in ring, weigh-in, nominations, etc.).</li> <li>• Follow all OCES policies and behavioral guidelines. This includes appropriate roles associated with youth livestock events and ethics guidelines.</li> <li>• <b>May assist with enrollment data entry and reviewing enrollment for the Extension Educator.</b></li> </ul>

## COUNTY 4-H LEADERSHIP POSITIONS

<b>County Project Leader</b>	When there are county project committees, the chairperson generally is the County Project Leader. These volunteers primarily train local Project Leaders and older 4-H members/teen leaders. They have a responsibility to stay updated in their area of interest and to work with Extension staff in planning for special programs related to the project.
<b>County Activity Leader</b>	The county activity leader may be the chairperson of countywide committees such as: a camp, Share-the-Fun or Design and Construction Event. They have the responsibility of planning and coordinating specific county activities, providing training that is necessary for the activity and serving as a key liaison with local Activity Leaders.
<b>County Committees</b>	Volunteers who serve on county committees and especially as committee chairmen have an added leadership responsibility for countywide program planning and decision-making. Number and type of county committees vary greatly; they may be related to projects, activities or may be of an overall nature such as resources, publicity or planning. In the county leadership structure committees fall under the guidance of the PVA.
<b>Resource Leader</b>	A resource person is a short-term episodic/volunteer who serves at the county level as an instructor for a special interest program(s), parent-volunteer training/continuing education, as a mentor, serve on a county planning committee(s), coordinate judges for activities and events, or may even serve as superintendents. If this individual is not certified they cannot have unsupervised direct contact with youth.
<b>County Parent-Volunteer Organization/Association</b>	This is an organized body of 4-H volunteers and parents/guardians who provide program assistance and leadership at the county level. Many county committees may stem from this group.
<b>County 4-H Youth Council</b>	This council is usually composed of officers from each club, headed by the elected county 4-H youth officers. The group functions in program assistance and leadership at the county level, working in cooperation with the Parent-Volunteer Association. Other youth leadership groups may include Teen Leaders and Ambassadors.
<b>County 4-H Program Advisory Committee</b>	The PAC is a body of interested adult and youth who represent the county geographically and ethnically. The group is composed of representatives of other youth-serving organizations, schools, the County 4-H Youth Council, 4-H volunteers, etc. The group analyzes needs and concerns of youth in the county and makes recommendations for OCES consideration.
<b>County 4-H Foundation</b>	The foundation has a voluntary board of directors who assist with youth and adult education through financial support of the county 4-H program. The foundation does not determine program direction, but promotes, encourages and enriches 4-H by its strong financial backing. <i>Many counties have found the creation of an actual incorporated foundation is not practical due to tax reporting issues. Before taking that step consult the OK 4-H Foundation for advice. (2007)</i>
<b>County Extension Staff</b>	Staff members – professional responsible for the management of the total 4-H program in the county.
<b>District and State 4-H Staff</b>	Staff members with a broader geographic area. Each Extension district has a District 4-H Program Specialist who lives and works in the district, while State 4-H staff has program responsibilities for the entire state. The purpose of these staff members is to supervise county staff and provide support needed for county and local 4-H programming.



## **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.
- 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 as a whole.
- 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 RECOGNITION MODEL

Recognition is one way to help individuals become self-directed, productive and contributing citizens. 4-H uses five types of recognition. Each supports, motivates and encourages 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. (2015 about.com- about education)

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 of time. 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 energizein.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 of 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, hand shake, an extension of gratitude, feature story blog/website/newspaper
- Honors
- Meals – 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

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/>.

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

## 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 currently serving 4-H volunteers who have served as 4-H volunteers for **less than 10 years** at the local, county, district or state level.
- ✿ The **Outstanding Lifetime Volunteer Award** (OLV) is for current or former 4-H volunteers, who have served **10 or more years** at the local, county, district or state level. A county Lifetime nominee may be nominated up to 3 times with a minimum of 3 years between each nomination.

The application packet is posted on the Oklahoma 4-H website 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 achieves the annual continuing education requirements.

Both forms are housed at


[http://4h.okstate.edu/acl\\_users/credentials\\_cookie\\_auth/require\\_login?came\\_from=http%3A//4h.okstate.edu/for-educators/staff-resources-1/](http://4h.okstate.edu/acl_users/credentials_cookie_auth/require_login?came_from=http%3A//4h.okstate.edu/for-educators/staff-resources-1/) under "For Educators/Staff Resources."

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 serve the Oklahoma 4-H Youth Development program.

**Oklahoma 4-H  
Certified Volunteer**


 18 USC 707

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

Oklahoma 4-H Youth Development  
recognizes

\_\_\_\_\_ has successfully completed \_\_\_\_\_ units in continuing education, Working with Minors and Title VII & IX training in \_\_\_\_\_ County.

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

 4-H YOUTH DEVELOPMENT

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

## **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.
- 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 as a whole.
- 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.**

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

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

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 <http://www.4-h.org/resource-library/professional-development-learning/4-h-volunteer-development/> 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 give 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 in order 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. In actuality, 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 training 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 practice 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 their motivation in offering to 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 taking action 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, more often than not 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 has the opportunity to 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, 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 actually 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 downhill 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/> 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.

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### **MANAGING VOLUNTEER PERSONNEL FILES THROUGH 4HONLINE®**

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As of September 1, 2017 all-volunteer records will be housed electronically within the individual's profile in 4HOnline®. Paperwork (reference check, interview forms, etc.) and correspondence will be scanned and uploaded into the designated field as one (1) PDF document in 4HOnline.

Prior to September 1, 2017, counties were to scan and upload all existing paperwork, negating the pre-existing requirement of locked file cabinets. Instruction for maintaining online files are contained in the 4HOnline data base.

The only electronic file visible to a volunteer is the club/cloverbud leader position description. All other electronic files/fields are only visible to county, district and state staff.

As a profile is created in 4HOnline®, the profile will include fields to upload and record

- a) All emails, correspondence, reference checks and any other documentation (as a single PDF document).
- b) Signed position descriptions
- c) An Annual Assessment document
- d) Status
- e) Restrictions

**Never provide the volunteer materials in their file.** The volunteer should not be privy to information which may have been obtained during the screening process or documentation of personnel issues.

# MAINTAINING CERTIFICATION

## Annual Requirements

Each year the volunteer must re-enroll and complete all authorizations which include Assumption of Risk and Release of Claims; Adult Behavioral Guidelines; Medical Release; Publicity Release; Statement of Understanding, Survey and Evaluation Release and the “generic” Volunteer Agreement.

Club leaders, including Cloverbud leaders must sign a more detailed agreement. This has been simplified by making their agreement a signed copy of the position description.

Volunteers who enroll online must “check” they have downloaded their position description, which is hyperlinked in multiple locations in 4HOnline. If a county is using paper enrollment for volunteers, the Extension educator is responsible for making sure the volunteer received the appropriate position description. (2017)

## Continuing Education


As stated previously in “Continuing Education,” volunteers need to annually participate in four (4) continuing education/trainings and renew the Working with Minors (WWM) and Title VII & IX training.

## Recording Training

Records are to be recorded under “Training” in 4HOnline. Reports generated through the data management system will be 4-H Youth Developments official record if we are audited.

## Recognition

The Extension educator are to recognize volunteers who have/have not achieved the annual certification requirements. This form of recognition is done following a well-planned and thoughtfully implemented “assessment” process described earlier in this chapter. It is finalized with a letter/email (sample letter 6 or 8) and/or using the “Certificate of Renewal”. The process is to be constructive in the development and maintenance of the volunteer.

 <div>Organizational Club Leader <i>Thank you for your time, talents and service.</i></div>	
<small>The following expectations have been established for persons serving in a volunteer capacity as an Organizational Club Leader for a local, project or county 4-H club. The position description provides the basis for an annual Volunteer Position Feedback and Evaluation. Please carefully consider the following expectations and confirm that you are aware of the expectations by signing the document.</small>	
<b>Purpose</b>	<b>4-H Club (Name)</b> <ul style="list-style-type: none"><li>Enrich lives of 4-H members and families by coordinating a 4-H Club which provides a safe and educational environment for personal growth, project work and friendship.</li></ul>
<b>Primary Responsibilities</b>	<ul style="list-style-type: none"><li>Help ensure the safety and well-being of club members and families.</li><li>Encourage youth to exemplify the 4-H name through positive behavior and actions.</li><li>Practice the Essential Elements of positive youth development – Belonging, Independence, Generosity and Mastery</li><li>Committed to the 4-H philosophy of “Learn by Doing.”</li><li>Understand the effective use of three youth development models: Experiential Learning Model, 4-H Recognition Model and 4-H Life Skills Model.</li><li>Actively seek volunteers and youth from a variety of racial, ethnic, religious and socio-economic groups in your community.</li><li>Encourage project development through project groups supported by Project Leaders/Volunteers.</li><li>Assist in the identification, recruitment and training of volunteers as activity, project and teen leaders.</li><li>Encourage and welcome parental assistance, ideas, support and attendance.</li><li>Promote responsibility, personal growth and planning of 4-H project work by members, families and volunteers.</li><li>Encourage/recruit youth, parents and volunteer participation in a variety of project areas and other opportunities – project work, community service, social activities and participation in county, district and state events.</li><li>Stay current and familiar with educational information available from the Cooperative Extension Service/4-H Youth Development.</li><li>Be positive and enthusiastic. If conditions are less than desirable your tone will influence the group’s mood.</li><li>Have fun.</li></ul>
<b>Specific Duties</b>	<ul style="list-style-type: none"><li>Immediately address and report any behavior that endangers a child or group of youth or negatively impacts the surroundings.</li><li>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.</li><li>Maintain clear, frequent and timely communications with youth, families, volunteers and extension office.</li><li>Annually renew Club Charter with the assistance of club members, volunteers and parents.</li><li>Organize the club through youth officers and committees. Ensure these</li></ul>
<small>Revised 2015</small>	<small>Oklahoma 4-H Volunteer Position Description and Agreement</small>

## ASSESSMENT OF 4-H VOLUNTEER

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

### Annual Assessment with Club Leaders

Extension educators will annually conduct individual visits with organizational leaders/assistant Club leaders/Cloverbud leaders to discuss commitment, performance and review responsibilities to the club/county 4-H program. If during orientation the individual received a copy of the assessment tool 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 volunteer is provided a copy. Scan and upload the assessment to the volunteer’s profile in 4HOnline®.

### 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 in 4HOnline.

As noted before, none of this will be a surprise if the process and form are shared during orientation process and volunteers are reminded from time-to-time.

### Purpose for Assessing Volunteers

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 volunteers understand what they need to do to improve or meet minimal standards.

Oklahoma 4-H Volunteer Management System					
4-H ORGANIZATIONAL/CLUB LEADER ASSESSMENT					
Annually, the County Extension Educator(s) and the organizational leader(s) meet to review performance and to assess the volunteer's needs related to the volunteer position in which they were hired to serve. It is recognized that these are the minimum expectations; individual counties may make additions to this document.					
Name: _____		Club: _____		Year: _____	
<b>Training/Continuing Education</b> Documented in 4HOnline Data Management System: <input type="checkbox"/> 4-H Volunteer Enrollment Current <input type="checkbox"/> Working with Minors Training <input type="checkbox"/> Title VII & IX Training <input type="checkbox"/> Four Continuing Educations completed, if not how many completed			<b>Club Management – Charter Renewal</b> Documented in 4HOnline Data Management System: <input type="checkbox"/> Club Charter renewal process completed.		
<b>Specific Duties:</b>					
	Not Met	1	2	3	4 5
1. Immediately addressed and reported any behavior that endangers a child or group of youth or negatively impacts the surroundings.		1	2	3	4 5
2. Familiar 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.		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. Encouraged other volunteers and parents to assume leadership roles in the club as noted in primary responsibilities of the position description.		1	2	3	4 5
10.		1	2	3	4 5
11.					
<b>Working Relationships</b>					
	Needs Improvement	1	2	3	4 5
a. Relations with other volunteers, parents and families		1	2	3	4 5
b. Relations with staff		1	2	3	4 5
c. Relations with 4-H membership		1	2	3	4 5
d. Initiative		1	2	3	4 5
e. Flexibility		1	2	3	4 5
f.		1	2	3	4 5
9		1	2	3	4 5

Oklahoma 4-H  
VOLUNTEER MANAGEMENT SYSTEM

Revised 10/2015

## Preparation for Scheduled Appointment

1. Using the appropriate volunteer assessment tool (see **Forms** or Staff Resources listed under Volunteer Management Systems [//4h.okstate.edu/for-educators/staff-resources-1/](http://4h.okstate.edu/for-educators/staff-resources-1/)).
2. Schedule adequate time for the volunteer's assessment.
3. Give great thought to filling out the assessment tool. An acceptable 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.

The new assessment tool (2015) provides an opportunity to bounce ideas around and introduce new ideas and concepts. Responses and thoughts expressed can be pleasantly surprising when people have quality time and are not being influenced or affected by possible peer influence.

Video and short article titled *Provide Feedback That Has an Impact*.

[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](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) 2015



## 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 and resources. The volunteer must be committed to making behavioral changes and/or attending training and putting the content into practice.

Often probation can be avoided with 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
2. Behavioral Guidelines have been broken
3. Breach in published Rules or Guidelines
4. Volunteer Agreement/Position Description has not been fulfilled

The volunteer should understand they are on probation for a defined period of time or until the agreed plan/requirements has been met. During this time, “restrictions” on the volunteer’s status should be recorded in the 4HOnline enrollment system. (See page 44)

Be sure to keep records of all conversations, meetings and correspondence (US Postal or electronic) shared with the volunteer in regard to the probation. These records are to be uploaded to 4HOnline.

#### Certification Requirements - County Record Management

##### 4HOnline Volunteer Personnel File - NEW and RETURNING

All files for volunteers are to be maintained as part of the 4HOnline data management system. Paperwork (reference check, interview forms, etc.) and correspondence for the applicant will be scanned and uploaded as one (1) PDF document.

From year to year, PDF files can be merged to add additional materials to the electronic file. There are a variety of programs for merging PDF Documents.

**Certification Denied** – Upload one electronic document of all paperwork and correspondence for person's denied certification. The profile and documents are to be kept indefinitely. If the individual applies to volunteer somewhere else in OK, the files can be accessed through 4HOnline®.

Volunteer Personnel Paperwork - reference check, interview forms, correspondence, etc. (Image/PDF files)

PDF

Select Clear



## REPORTING SUSPECTED ABUSE, NEGLECT OR DISCRIMINATION

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### Child Abuse or Neglect

Because of the nature of our jobs we as Extension professionals are required by law to report suspected child abuse or neglect. Any Oklahoma citizen who believes a child under the age of 18 has been abused or neglected is mandated by law to report the suspected abuse. Failure to do so is a crime.

Under Oklahoma law, a person making a report in good faith is immune from both civil and criminal liability. Department of Human Services (OKDHS) policy and state law require strict maintenance of the confidentiality of reporters of child abuse and is subject to disclosure only with the consent of that person or by judicial process. Anonymous reports are also accepted.

A report should promptly be made when there is reasonable cause to believe that a child or adolescent has been abused or neglected, or is in danger of being harmed. A report is only a request for an investigation. The person making the report does not need to prove the abuse. Investigation and validation of child abuse reports are the responsibility of child protection service workers.

**Report suspected child abuse by contacting OKDHS Abuse and Neglect Hotline at 1-800-522-3511 and local law enforcement.** OKDHS only deals with family and daycare settings, law enforcement deals with ALL! (WWM 2013)

When contacting local law enforcement you should include all available information regarding the known or suspected abuse or neglect, including, but not limited to, the name of the child, his whereabouts, the names and addresses of the parents, guardian, or caretaker and the character and extent of the injuries. The report should also contain, if known, any evidence of previous injuries to said child and any other pertinent information that might establish the cause of such injury or injuries, and the identity of the person or persons responsible for the same. (WWM 2013)

It is critical to accurately reflect the nature of the abuse. Do not overstate, nor minimize, the extent of the suspected abuse. Do not directly question or solicit information from the child or from the person suspected of improper behavior. That is not your role; the role of investigation lies with city, county, and state officials not with you. (WWM 2013)

Reports are prioritized and response time is based on the potential risk to the child(ren). A DHS Child Protective Services Worker will investigate the reported abuse and/or neglect by gathering information and interviewing the child, family members, or other persons. The investigation will result in one of the following findings:

- Services Not Recommended
- Services Recommended
- Confirmed – Services Recommended
- Confirmed – Court Involvement.

If the report concerns abuse or neglect that is not serious or extremely dangerous, an assessment may be conducted instead of a more in-depth investigation. No findings are made on assessments and families may be referred to other helpful services.

If the alleged abuse is perpetrated by someone other than a parent or caretaker, DHS is required to forward the report to law enforcement. Also, law enforcement is the only entity that can take a child into protective custody. Without a court order, DHS cannot remove children from their homes.

A report may be rejected by DHS if there is insufficient information to locate the family and child, or if the report does not meet the legal definition of abuse or neglect (i.e. adolescent behavioral problems, parent/child conflicts, or poor parenting practices in which abuse or neglect is not occurring).

## **Title VII**

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Given that 4-H is a federally assisted program and as such, all programs, activities, events and competitions (state, area, county, local, regional and national) must be non-discriminatory according to federal law. Additionally, the 4-H program may not accept sponsorships, donations or awards that are based on discriminatory practices.

Title VI and VII prevents discrimination by government agencies or Universities that receive federal funds. If an agency is found in violation of any of these laws the agency may lose its federal funding. (Reference: Taken directly from 4-H National Headquarters Fact Sheet: title IX & 4-H Youth Development.)

Title IX of the Education Amendments of 1972 prohibits discrimination on the basis of sex in any educational program or activity receiving federal financial assistance. Since Cooperative Extension 4-H Programs receive Federal financial assistance for education programs, they must adhere to USDA regulations prohibiting discrimination on the basis of gender.

Consistent with these regulations, no State Extension may have an exclusive or formally gender-segregated 4-H program. Although, some individual 4-H clubs/groups may attract members of one gender, this is the result of interests and choice and should not be a requirement of membership.

Title IX, as of 2012, requires colleges and universities to eliminate the hostile campus environment caused by sexual violence, domestic violence, dating violence and stalking. As an extension of Oklahoma State University all locations hosting an activity in the name of 4-H Youth Development become an extension of the university's campus.

Cooperative Extension and 4-H Youth Development employees and volunteers are obligated to eliminate any practices that limit, deprive, or tend to deprive any youth and/or volunteers of opportunities for membership or otherwise discriminate against these individuals because of gender, racial, ethnic, religious and socioeconomic groups in the community.

In all cases, the requirements and/or guidelines for competition/awards/scholarships must provide equal access for all youth and volunteers and must not be designed to create participation barriers. Guidelines should be reasonable and attainable.

## Title IX

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The University offers both confidential reporting and non-confidential reporting options. **When a minor is involved confidential reporting is not an option.**

Confidential reporting options provide individuals with an option to confidentially report and discuss an instance of sexual harassment including sexual violence without their information being shared with others. Please note, confidential reporting limits the University's ability to respond to incidents.

Federal laws and Department of Education (DOE) guidance, place significant obligations on higher education institutions like OSU to address allegations of sexual harassment and sexual violence. This of course does not supplant or replace the criminal justice system – or the ability of a survivor to seek damages using the criminal system.

DOE, OSU, Oklahoma Cooperative Extension Service and 4-H Youth Development programs expects that once the Institution has notice of sexual harassment, sexual misconduct, or sexual violence the Institution should take immediate and appropriate steps to investigate what occurred and take prompt and effective action to:

- End the harassment
- Prevent any recurrence and
- Remedy the effects

OSU requires all employees, volunteers, youth and associates to be mandatory reporters. If you learn about sexual harassment, discrimination or sexual assault associated with a sanctioned 4-H activity or event you are expected to promptly report it following 4-H Crisis Management protocol. (WWM Form 9)

**When OSU is made aware of a report of Sex Discrimination, the University must...**

- Give notice to the parties of the grievance procedures, including where complaints may be filed.
- Provide adequate, prompt and impartial investigation of complaints, including the opportunity for both parties to present witnesses and other evidence
- Give notice to parties of the outcome of the complaint
- Provide steps to prevent recurrence of any harassment and to correct its effects of the complainant and others if applicable

The University will not tolerate retaliation against a person who brings a complaint forward in good faith. Retaliation against an individual who has brought a complaint forward or against an individual who has participated in an investigation is prohibited. This is outlined in the Board of Regents Anti-Retaliation policy 3.11.

## 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 <http://www.4-h.org/resource-library/professional-development-learning/4-h-volunteer-development/>.

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

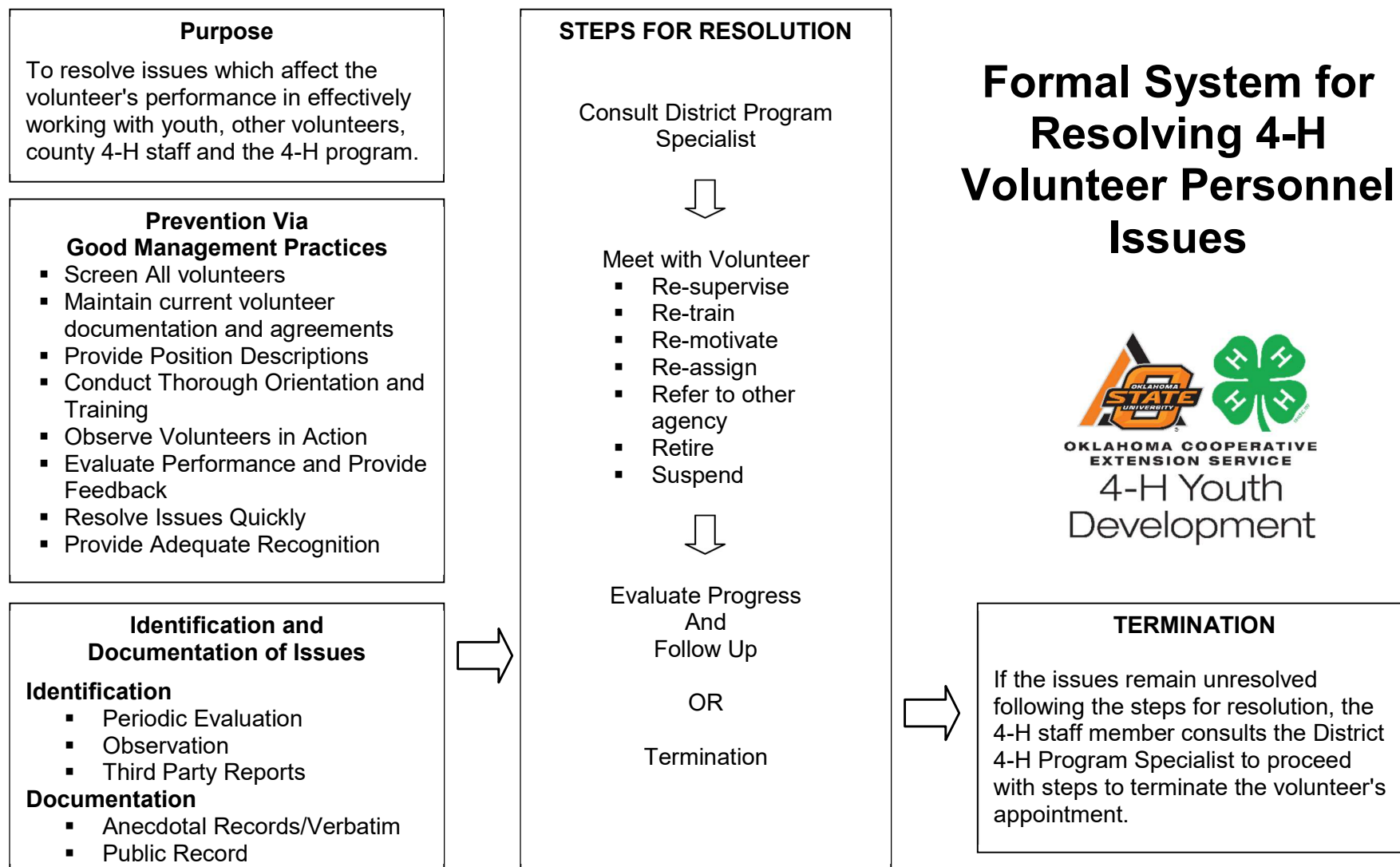
The process begins when it first becomes evident that a 4-H volunteer is not performing up to the expectations and standards of behavior listed in the Volunteer Agreement and Behavioral Guidelines. See the flow chart on the next page for a visual representation of the formal process described in this 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 or verbal abuse of youth or other adults, substance abuse, committing a criminal act, misuse of funds, irresponsible handling of animals, vehicles or machinery.

### PREVENTION VIA GOOD MANAGEMENT PRACTICES

The most important step in dealing with volunteer issues is to prevent them from happening in the first place. 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, using standard reference forms.



- **Obtain Signed Volunteer Agreements:** Make sure that all volunteers read and sign the Volunteer Enrollment form. Review the form with them in person and answer any questions to ensure that they have a good understanding of each of the items.
- **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 training to all volunteers on current topics and procedures.
- **Evaluate Performance and Provide Feedback:** Develop a method for regular evaluation of volunteer performance for all of your volunteers. 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 become aware of them. 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.

### 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 fact, 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 folder.
- **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: Consulting with 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 should be a non-4-H 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 volunteer's 4-H Volunteer Agreement, Enrollment Form and Behavioral Guidelines to explain how the problem behavior is in conflict with signed documents and how the volunteer is not meeting expectations outlined.
- c. Review possible solutions with the volunteer. The following solutions are not listed in any particular 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 more productively be utilized.

**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 considered to be 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 to the volunteers 4HOnline profile.**



# 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: Consultation with 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 should be a non-4-H 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 volunteer's relationship – collect leader's guides, keys, bank accounts, 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 4HOnline, upload all documentation and move the membership status to "Archive."

Oklahoma 4-H  
**Volunteer Management System**

# Forms



**OKLAHOMA COOPERATIVE  
EXTENSION SERVICE**

4-H Youth  
Development

**The following forms are posted at**

**<http://4h.okstate.edu/for-educators/volunteer-management-system>**

**Please go to the web site for the most current versions of**

- 4-H Volunteer Application – Will not be used as of September 1, 2016
- Oklahoma 4-H Volunteer Enrollment form
- Organizational/Club Leader Agreement
- 4-H Organizational/Club Leader Assessment – annual
- 4-H Volunteer Assessment – as needed
- Confidentiality Statement – 4 per sheet
- Volunteer Counseling and Dismissal Checklist
- Reference Form
- Reference Form for Phone or Face-to-Face Interviews
- Applicant Interview Form
- 4-H Certified Volunteer Certificate
- Annual Renewal of 4-H Volunteer Certification Certificate
- 4-H Parent-Volunteer Continuing Education Credit card
- Volunteer Counseling and Dismissal Checklist
- Reference Form
- Reference Form for Phone or Face-to-Face Interviews
- Check List for Certified Volunteers “Individual Volunteer’s” File

# Oklahoma 4-H Youth Development Program

## CONFIDENTIALITY STATEMENT

I, the undersigned, do hereby acknowledge that in my service for 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 will 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.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

I, the undersigned, do hereby certify that I have discussed the guidelines for confidentiality with the volunteer named above.

\_\_\_\_\_  
Date

\_\_\_\_\_  
4-H Extension Educator's Signature

Oklahoma 4-H Youth Development  
recognizes

\_\_\_\_\_ has successfully completed  
\_\_\_\_\_ units in continuing educations, Working  
with Minors and Title VII & IX training in  
\_\_\_\_\_ County.

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



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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

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 serve the Oklahoma  
4-H Youth Development program.

**Oklahoma 4-H  
Certified Volunteer**



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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

**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 \_\_\_\_\_

\_\_\_\_\_  
**Signature of Sponsoring Organization Representative**

# Volunteer Counseling and Dismissal Checklist

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

Prior to Making A Decision	Yes	No
Have you reviewed organizational policies and procedures related to volunteer personnel issues?		
Is the individual's enrollment/personnel file current? (position description, application, correspondence, meeting notes, training, etc.)		
Has the situation been carefully researched?		
Have multiple options been considered for dealing with the volunteer's behavior or inability to fulfill their responsibilities, as were shared in training and/or in the form of a position description?		
<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 Guidelines, Volunteer Agreement, Position Description, Working with Minors 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 council them?		
Are all counseling sessions (phone calls, emails, letters, etc.) with the volunteer and 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?

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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 disabled, from different ethnic and racial backgrounds, alternative life styles 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 his/her 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 and Langston 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, sex, 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 and racial backgrounds, alternative life styles 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: <input type="checkbox"/> 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 as found on in the online application. 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.

**Communication Skills** - 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 all the families in your club/project?

COMMENTS:

**Interpersonal Skills** - 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:

**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 sessions 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 and racial background, developmentally disabled, alternative life styles, different socio-economic background, etc.?

COMMENTS:

<p><b>Teamwork Skills</b> - 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?</p> <p>COMMENTS:</p>			
<p><b>Institutional Systems</b> – 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 major things do you want to happen in 4-H? Why do you want to be a 4-H volunteer? What is your view on competition? How important is winning to you?</p> <p>COMMENTS:</p>			
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
<p>Action or Follow up needed:</p>			
Date Received	Signature of Interviewer		

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## 4-H ORGANIZATIONAL/CLUB LEADER ASSESSMENT

Annually, the Extension Educator(s) and a designated club leader(s) meet to review performance and to assess the volunteer's needs related position they were employed to serve. It is recognized that these are the minimum expectations; individual counties may make additions to this document.

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

### Training/Continuing Education:

Documented in 4HOnline Data Management System:

- ☐ 4-H Volunteer Enrollment "Active"
- ☐ Working with Minors training
- ☐ Title VII & IX Training
- ☐ Four Continuing Educations completed, if not how many completed \_\_\_\_\_

### Club Management – Charter Renewal

Documented in 4HOnline Data Management System:

- ☐ Annual 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.	1	2	3	4	5
2. Familiar 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.	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 leaders/officers and committees. Ensure youth are educated/trained for being successful and effective leaders – preparing for meetings, basic parliamentary procedure, conducting meetings, developing committees, etc.	1	2	3	4	5
6. Returned On TRAC plans, enrollment & program fees, 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 programming efforts.	1	2	3	4	5
10.	1	2	3	4	5
11.					

### Working Relationships

	Needs Improvement		Satisfactory		Excellent
a. Relations with other volunteers, parents and families	1	2	3	4	5
b. Relations with staff	1	2	3	4	5
c. Relations with 4-H membership	1	2	3	4	5
d. Initiative	1	2	3	4	5
e. Flexibility	1	2	3	4	5
f.	1	2	3	4	5
g.	1	2	3	4	5

Comments by Extension Educator regarding above areas:

Comments by volunteer regarding above areas:

Most significant achievement during period of evaluation:

Major area in which improvement, change or further training would be desirable, with description of suggested course of action"

Overall, how does the volunteer feel about remaining in this position? What change in nature of responsibilities or procedures 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 between now and the next evaluation period?

- 1.
- 2.
- 3.
- 4.
- 5.

Other recommendation or comments:

Scheduled date of next evaluation:

\_\_\_\_\_  
Date

\_\_\_\_\_  
Organizational Leader Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Extension Educator



**4-H Volunteer Certification/Re-certification**  
**RUN 4HONLINE CUSTOM REPORT "VOLUNTEER PERSONNEL FILE"**  
**TO AUDIT ELECTRONIC FILES**

Volunteers Name: _____	
4-H Club Associated with _____ or Volunteer at Large _____	
Year Certification Completed/Last Certified _____	
<b>All documentation and personnel paperwork is to be uploaded/maintained the individual profile in 4HOnline.</b>	Completed ✓
<b>APPLICATION</b> thoroughly completed in 4HOnline.	
Volunteer received a <b>NOTIFICATION</b> "Application Received" and a copy is uploaded. - Sample letter1	
<b>BACKGROUND CHECK /SCREENING</b> – County has fulfilled or exceeded minimum expectation. Recorded in 4HOnline.	
<b>VAC AND REFERENCE CHECK</b> Volunteer Advisory Committee (VAC) has reviewed application and references (as necessary) have been checked. VAC approval (names) recorded in 4HOnline, reference form(s) and committee notes uploaded.	
Volunteer received <b>NOTIFICATION "Application Approved"</b> (Sample letter 2) and a copy is uploaded. <b>"APPLICATION DENIED"</b> (Sample letter 3) and a copy is uploaded.	
<b>4-H PYD ORIENTATION, WWM AND TITLE VII &amp; IX COMPLETED AND RECORDED IN 4HONLINE</b>	1. 2. 3.
1. Attended 4-H Youth Development Orientation	
2. Completed Working with Minors Training and Title VII & IX	
3. Volunteer Screening Status recorded and Enrollment completed	
Volunteer received <b>NOTIFICATION</b> stating " <b>Certification Pro</b> ..." (sample letter 4) and a copy is uploaded.	
<b>Annual Continuing Education</b> – ALL CE is recorded in 4HOnline as "Training." Be pro-active and throughout the year run 4HOnline reports tracking attendance. Using sample letter 5-7, to keep volunteers informed. Document community involvement and upload to profile.	
<b>Certified Volunteer</b> – second year and beyond – all steps below done annually	
Completed <u>Volunteer Enrollment</u> - A reas... and documentation should be maintained of efforts to renew paperwork. Sample letter 6 s... letting them know their status has been renewed. This is documented by the printed... at the end of the program year using the on-line enrollment system records.	
<b>Annual Agreement and Position</b> – Club leader/Cloverbud leader have signed agreement on file in 4HOnline. All other... have been provided the appropriate position description for their role.	
<b>Annual Continuing Education</b> – Record continuing education in 4HOnline as "participation." Annually print a report of "participation" recorded in 4HOnline and place in the volunteer's electronic file. This documents that they are being renewed as a certified volunteer.	
<b>Assessment Form completed</b> OCES Volunteer Manager(s) annually complete an organizational/club leader assessment, <b>with the volunteer</b> . All other volunteers will have an assessment complete every three – five years unless deemed otherwise necessary by the county educator/DPS. Place the signed form in the file and record in 4HOnline.	
<b>Probation or Inactive Communications/Correspondence</b> Volunteers who do not maintain the annual requirements for certification will be counseled by the OCES Volunteer Manager and placed on a probationary status <i>for one year with the understanding that they will fulfill the expectations and requirements of "certification". At the end of the probationary year, if the agreements have been fulfilled, the individual will return to active status as a "certified" 4-H volunteer.</i> Sample letters 8, 9, and 10 in VMS manual. Keep a file of all meetings and correspondence and record action in ACCESS 4-H.	

Under revision – 11/3/17

Revised 10/2015



Oklahoma 4-H  
**Volunteer Management System**

# Reference Tools



APPLICANT FOR 4-H VOLUNTEER POSITION– **APPLICATION RECEIVED**

*Sample 1*

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

Thank you for your interest in serving as a certified 4-H volunteer in the Oklahoma 4-H Youth Development program. Your **enrollment** and application has been received **in 4HOnline®**. Applicants will be reviewed by the county Volunteer Advisory Committee (VAC). You will be notified of the applications status by *<date>*.

If the VAC approves your application you must attend the following orientations to complete the certification/re-certification process.

Date	Time	Orientation	Location/online
		Brown Bag Lunch 4-H PYD	
		Orientation	
		Evening 4-H PYD Orientation	
		OK Working with Minors Training	
		OK Title VII & IX	

Thank you for your willingness to share your time, talents and resources with the Oklahoma 4-H program.

Sincerely,

*<name>*

Extension Educator

4-H Youth Development Programs

APPLICANT FOR 4-H VOLUNTEER POSITION– **APPLICATION APPROVED**  
Sent to approve applicants, notifying them of orientation session.

*Sample 2*

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

Your volunteer application has been reviewed and accepted. The Oklahoma Cooperative Extension Service is pleased to welcome you as a 4-H Volunteer in \_\_\_\_\_ County. We feel you will be a valuable addition to our program.

To complete the certification process you must complete the following orientations.

Date	Time	Orientation	Location/online
		Brown Bag Lunch 4-H PYD	
		Orientation	
		Evening 4-H PYD Orientation	
		OK Working with Minors Training	
		OK Title VII & IX	

**Please RSVP**, to the Extension Office as to **the session you plan to attend by \_\_\_\_\_**. When all sessions are completed your enrollment and certification will be “approved.”

The following topics are addressed during the Youth Development orientation:

- Positive Youth Development – OCES, Education through project work, Life Skills Development, Recognition Model and Experiential Learning.
- Program Policy – 4-H Membership Guide and review Affirmative Action statement
- Structure of Local and County 4-H Program - Review organizational structure
- Managing Risk – Liability, Insurance, Transportation, Chaperoning, Code of Conduct, Youth and Adult Medical Form(s)
- Continuing Education Opportunities – County, District and State
- Maintaining Certification

Please feel free to call us if you have questions.

Sincerely,

<name>

Extension Educator

4-H Youth Development Programs

APPLICANT FOR 4-H VOLUNTEER POSITION— **APPLICATION DENIED**

*Sample 3*

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

After careful consideration of your application, the \_\_\_\_\_ County Extension educator(s) in cooperation with the Volunteer Advisory Committee do 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

APPLICANT FOR 4-H VOLUNTEER POSITION – **COMPLETED CERTIFICATION PROCESS**

Letter sent to new volunteers who have completed all of the steps in the certification process. They are now officially “certified.”

*Sample 4*

«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 organizations.

Since you have completed the certification process, you are officially recognized as “certified” 4-H volunteers. Enclosed is a certificate designating your recognition.

As a reminder, to maintain your “active” status, be sure to participate in one additional continuing education opportunity before August, the end of the program year.

Continuing education is our means for providing volunteers an opportunity for

- Continued intellectual growth,
- A means for introducing/learning new information,
- Improving skills,
- Preparing for responsibility,
- Being involved in teaching others,
- Adapting to change,
- Understanding context and theory, and
- Preventing burnout.

Check out the Oklahoma 4-H webpage (<http://4h.okstate.edu/>), our county newsletter and website and general correspondence from our office for the latest information regarding programming for youth and adults. Please do not hesitate to call and ask questions.

Sincerely,

<name>

Extension Educator

4-H and Youth Development Programs

Attachment: Certificate of Certification

APPLICANT FOR 4-H VOLUNTEER POSITION – **NEED TO COMPLETE CERTIFICATION PROCESS**  
Second notification of need to complete certification process.

*Sample 5*

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

During the \_\_\_\_\_ program year, your application to become a certified 4-H volunteer was reviewed and approved by the County Volunteer Advisory Committee. According to our records you need to complete ☐ New Volunteer Orientation, ☐ Working with Minors Training and/or ☐ Title VII & IX Training.

Please take advantage of the following opportunities. If there is a hardship which does not allow for attendance please call me to discuss alternatives.

Date	Time	Orientation	Location/online
		Brown Bag Lunch 4-H PYD	
		Orientation	
		Evening 4-H PYD Orientation	
		OK Working with Minors Training	
		OK Title VII & IX	

**Please RSVP**, to the Extension Office, **the session you plan to attend by \_\_\_\_\_**. Please understand enrollment continues to be “pending” and you are not recognized as a “certified” volunteer until all trainings have been completed.

If you have chosen not to complete the certification process, at the time of 4HOnline enrollment “Rollover,” your application will automatically clear and the enrollment will revert to “inactive” status. On September 1, you can re-apply using the “Profile” started the previous year.

We hope you are still interested in joining our team and contributing to the growth the 4-H program. Please let us know if we can be of assistance.

Sincerely,

<name>

Extension Educator

4-H and Youth Development Programs



CERTIFIED VOLUNTEERS – **STATUS RENEWED**

Sent to all certified volunteers who **completed requirements** for the program year.

*Sample 6*

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

We recognize that 4-H volunteers work without monetary pay, give many hours of personal time and sometimes bear extra expense to help 4-H'ers develop into well-adjusted and useful citizens. Your cooperation and interest in the \_\_\_\_\_ County 4-H program is invaluable.

During the \_\_\_\_\_ program year, many of our parents and volunteers went well beyond our expectations at the local and county levels. Many of you not only invested time in our young people, but also invested in your own personal development by attending 4-H Parent-Volunteer Continuing Education.

We are pleased to inform you that your certification status has been renewed for the 20\_\_ - \_\_ program year. Be sure to re-enroll after September 1 and complete any volunteer agreement associated with your position.

Enclosed is a copy of the 20\_\_ - \_\_ Continuing Education opportunities. We hope it will be of assistance in scheduling quality time for your own personal development.

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

CERTIFIED VOLUNTEERS – **CONTINUING EDUCATION REMINDER**

Send this letter about ½ - ¾ of the way through the program year to volunteers who are not meeting continuing education requirements.

*Sample 7*

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

Thank you for your interest in being a 4-H volunteer. We are pleased you have completed the enrollment process.

In order to maintain your status as a certified 4-H volunteer in \_\_\_\_\_ County, you must attend four (4) Parent-Volunteer Continuing Education sessions and renew your Working with Minors and Title VII & IX training before August 15th each year.

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, through OCES 4-H Volunteer Self-study units 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 August \_\_, 20\_\_.

To assist in keeping your certification current we have noted the remaining opportunities for this 4-H year.

Date	Time	Continuing Education Opportunity	Location
------	------	----------------------------------	----------

We value you as a 4-H volunteer and respect the important contributions you make to our members and program. Without completing the necessary requirements, you will not be recognized as a “certified” 4-H volunteer in Oklahoma. By participating in the training opportunities noted above you will retain your “certified” status as 4-H volunteer with all the rights and privileges that come with certification.

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

Sincerely,

<Name>

Extension Educator

4-H and Youth Development

CERTIFIED VOLUNTEER ON PROBATION –**NOTIFIED OF PROBATION STATUS**

At the end of the program year, send to volunteers who **did not complete continuing education** requirements and who received *letter 7*.

*Sample 8*

«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 children explore and develop in a positive and safe environment.

On<date> a letter was sent notifying you that according to our records, you had not completed the requirements to maintain your certified 4-H volunteer status. The letter included opportunities for assisting you in completing the necessary Continuing Education.

As of <date>, you will be on a “probation”. Probation means, that during the next program year you must attend four (4) Parent-Volunteer Continuing Education sessions and renew the Working with Minors and Title VII & IX training.

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, through OCES 4-H Volunteer Self-study units or may even be professional development related to youth work or 4-H subject matter offered by another agency. Any noted combination of continuing education is sufficient. As has been explained, when the certification requirements are completed the probationary status will be removed from your enrollment.

Enclosed is a schedule of 4-H Parent-Volunteer Development opportunities scheduled for the \_\_\_\_\_ year. We encourage you to mark these programs on your personal and family calendar(s). Each of these programs will be an investment for yourself and our 4-H members.

Please let us know if we can be of assistance. 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

CERTIFIED VOLUNTEER ON PROBATION – **SPRING REMINDER TO VOLUNTEERS ON PROBATION**

Send only to volunteers who are on probation because they did not complete requirements for certification and they received letter 8 in the fall. This is the last reminder they will receive before no longer being recognized as a certified volunteer.

*Sample 9*

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

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

During the \_\_\_\_\_ 4-H program year, you completed the enrollment process to be a certified 4-H volunteer. On <date>, a letter was sent notifying you that according to our records, you had not completed the requirements to maintain your certification. The letter listed programs that could be recorded as continuing education credit.

A second letter, dated <date>, was sent stating that your status as a certified 4-H volunteer in \_\_\_\_\_ County was being placed on a one-year probationary status. It was explained that during the 20\_\_-\_\_ program year you needed to attend a minimum of four (4) continuing education opportunities and renew the Working with Minors and Title VII & IX training to have the probation restriction removed from your enrollment.

According to our records, these requirements have not yet been fulfilled for the current year. If you believe our records are incorrect and you have continuing education documentation please contact us at your earliest convenience. The Extension Office must have official documentation of any continuing education obtained through outside sources.

To assist you in keeping your certification current we have noted the remaining opportunities for this 4-H year.

Date	Time	Continuing Education Opportunity	Location
------	------	----------------------------------	----------

We value you as a 4-H volunteer and respect the important contributions you make to our members and program. Without completing the necessary requirements, you will no longer be recognized as a certified 4-H volunteer, will not be able to work with youth unsupervised, will not be covered by the 4-H insurance and your enrollment will be “archived.” By participating in the training opportunities noted above you will retain your certified status as a 4-H volunteer with the rights and privileges that come with this certification.

Please let us know if we can be of assistance. Thank you for your support in this effort to provide all members with an educational and memorable 4-H experience.

Sincerely,

<name>

Extension Educator

4-H and Youth Development Programs

Oklahoma 4-H

**VOLUNTEER MANAGEMENT SYSTEM**

CERTIFIED VOLUNTEER ON PROBATION – **MOVED TO “INACTIVATE” STATUS**

Send only to volunteers, who were put on probation,  
received adequate counseling and received letters 7, 8 and 9.

*Sample 10*

«Date»

«First\_Name» «Last\_Name»

«Address»

«City» «State» «Zip»

Dear «First\_Name»,

The 4-H program provides many fulfilling experiences for both adult and youth development.

According to our records your status as an Oklahoma Certified 4-H Volunteer will be archived. If at a later time you choose to return as a certified 4-H volunteer notify the Extension office so the profile can be re-activated.

If you believe our records are incorrect and you have documentation that the necessary requirements to retain certification have been met, please contact me by August \_\_, 20\_\_.

We value you as a 4-H volunteer and respect the important contributions you make to our members and program. Without completing the necessary requirements, OCES can no longer recognize you as a certified 4-H volunteer in Oklahoma.

Please let us know if we can be of assistance. Thank you for your support in our efforts to provide all members with an educational and memorable 4-H experience.

Sincerely,

<name>

Extension Educator

4-H and Youth Development Programs

## 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 and Oklahoma Cooperative Extension.</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 Opportunities

Example

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)

- ☐ Organizational Leader
- ☐ Assistant Organizational Leader
- ☐ 4-H Project Leader
- ☐ 4-H Activity Leader
- ☐ 4-H Volunteer
- ☐ 4-H Teen Leader
- ☐ Parent
- ☐ Other \_\_\_\_\_

## What training have you participated in this year? (check all that apply)

- ☐ Orientation for New Organizational Leaders and Assistant Leaders
- ☐ Activity and Event Chair Training
- ☐ New Volunteer Orientation and Enrollment
- ☐ Communicating through Project Work
- ☐ Have money...will SPEND!
- ☐ Safety at Every Turn
- ☐ Putting the Pieces Together through Animal 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 in the Local Club
- \_\_\_\_\_ Developing Local Club Leadership Teams
- \_\_\_\_\_ Stress Management for Members and Volunteers
- \_\_\_\_\_ Seeing the Wonder and Beauty in Diversity
- \_\_\_\_\_ Building Character through 4-H Project Work
- \_\_\_\_\_ Service Learning

## Suggestions:

### Hands on Local Club Activities in the Focus Areas

- \_\_\_\_\_ Health and Wellness
- \_\_\_\_\_ Family Strengths
- \_\_\_\_\_ Science and Technology
- \_\_\_\_\_ Environmental Awareness

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

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### Your Ideas

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**Suggestions:**

# 20\_\_-20\_\_ Green County Parent-Volunteer Development Opportunities

Example

***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 Title VII &amp; XII training</b>		Certified Volunteers
Online Training	<b>Variety of online 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 Organizational Leaders and Project Leaders</b>	Extension Office	New club leaders and project leaders
September 1, 20__, 6- 7 pm	<b>Initial Working with Minors Training</b>	Extension Office	New certified volunteers
September 26, 20__ 7-9 pm	<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>Initial Title VII &amp; XI Training</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	New Volunteer Orientation and Enrollment • <b>APPLICATION DEADLINE: OCTOBER 26, 20__</b>	Extension Office	New volunteers going through certification
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	New Volunteer Orientation and Enrollment • <b>APPLICATION DEADLINE: FEBRUARY 8, 2006</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

Down load prepared position descriptions and/r template at <http://4h.okstate.edu/for-educators/volunteer-management-system/volunteer-position-descriptions-2015-revisions>

	<p><b>[Insert Position Name]</b></p>
<p><i>Thank you for your time, talents and service.</i></p>	
<b>Purpose</b>	<ul style="list-style-type: none"> <li>• {Insert duty} .....</li> </ul>
<b>Primary Responsibilities</b>	<ul style="list-style-type: none"> <li>• Help ensure the safety and well-being of assigned youth.</li> <li>• </li> <li>• </li> <li>• </li> <li>• Encourage youth to exemplify the 4-H name through positive behavior and actions during all phases of transit.</li> <li>• Be positive and enthusiastic. If conditions are less than desirable your tone will influence the group's mood.</li> <li>• Attend orientation.</li> <li>• Support the person(s) in charge.</li> <li>• <i>Have fun.</i></li> </ul>
<b>Specific Duties</b>	<ul style="list-style-type: none"> <li>• Immediately address any behavior that endangers other youth or negatively impacts the surroundings.</li> <li>• In advance of the activity/event, familiarize yourself with policies related to first aid, emergency plans or any other risk management issues, as well as how you are to handle restroom stops and any behavioral problems.</li> </ul>
<b>Benefits</b>	<ul style="list-style-type: none"> <li>• Personal satisfaction of enabling 4-H members to become more subject matter knowledgeable by developing confidence and life skills.</li> <li>• Learning with the youth.</li> <li>• Positive adult interaction with the youth.</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>• Certified 4-H Volunteer in good standing, subject to annual review with Extension Educator.</li> <li>• Signed Volunteer Authorizations ("Behavioral Guidelines" for Volunteers. Form 5/6 Adult Liability Waiver, etc.) on file with the extension office.</li> </ul>
<b>Training/Continuing Education</b>	<ul style="list-style-type: none"> <li>• Annually completed OK Working with Minors Training.</li> <li>• Annually complete Title VII and IX Training</li> <li>• Certified 4-H Volunteer preferred/required.</li> </ul>
<b>Time Required</b>	<ul style="list-style-type: none"> <li>• Based on the itinerary/schedule provided by the person in charge.</li> </ul>
Revised 2015	Oklahoma 4-H Volunteer Position Description



