

## **CONSERVANCY VOLUNTEER PROGRAM GUIDELINES**

**Summary:** Staff recommends that the Board adopt Conservancy Volunteer Program Guidelines.

**Location:** Anywhere the Conservancy conducts program work, meetings, or support activities

**Fiscal Summary:** Support costs for administration of program, background checks, volunteer expense reimbursements, and workers compensation premiums and settlements for covered volunteers.

**Recommended Action:** Adopt Resolution 14-03-02 (Attachment 2).

---

### **Background**

The California Tahoe Conservancy (Conservancy) occasionally uses the assistance of volunteers to support and help implement its programs and projects. In some cases, the relationship between these individuals and the Conservancy is informal, while in other cases they are officially appointed as State “volunteers,” according to government code procedures set forth in State guidelines. The Conservancy seeks to formalize a volunteer program by incorporating State guidelines and Conservancy past practices. The Conservancy Volunteer Program Guidelines (Guidelines) will further the Strategic Plan key actions of stewardship and public awareness.

In the past, volunteers have assisted the Conservancy with monitoring and cleaning up adjoining Conservancy properties, site restoration activities, community cleanup days, forest stewardship days, water quality monitoring, and removing excess fuel wood from Conservancy lands. In the future, staff envision volunteers assisting with protecting cultural and natural resources, communicating Conservancy policy about

resource protection at specific locations, as docents providing educational talks, and in the office with project development.

## **Description of the Volunteer Program Guidelines**

Enabling citizens to be involved with Conservancy programs increases public support for the Conservancy and helps individuals better understand the programs, policies, and procedures of the Conservancy. Volunteers can enhance existing programs or begin new projects at a minimal cost to taxpayers. The Guidelines are designed to assist staff in managing volunteer programs. Specifically, staff should refer to the policies and procedures stated in the Guidelines for guidance in developing and implementing volunteer activities.

The Guidelines are divided into four sections:

### **I. Introduction**

The introductory section of the Guidelines describes the Conservancy Volunteer Program and defines citizen involvement in Conservancy operations. Legal authority for the Volunteer Program is cited by the passage of the California State Government Volunteers Act (Government Code §§3110 -3119.5).

The Guidelines establish two types of volunteers based on service length:

- Long-term volunteers: Individuals volunteer hours for a job duty is greater than or equal to 24 hours over the course of a fiscal year.
- Short-term volunteers: Individuals volunteer hours for a job duty is less than 24 hours over the course of a fiscal year.

### **II. Effective Management and Development of a Volunteer Program**

This section offers guidance and suggestions on establishing a Volunteer Program, including a Volunteer Program Coordinator, needs assessment, and reporting structure. The Volunteer Program Coordinator provides support for the Executive Director and other employees and coordinates the implementation of volunteer activities. A needs assessment serves as a formal investigation of how volunteers can serve the Conservancy and what type of volunteer skills are needed.

### **III. Policies and Procedures**

The Policies and Procedures section details Conservancy and State policies, guidelines, and legal requirements for managing a volunteer program. Duty statements shall be developed that outline specific volunteer duty responsibilities, performance standards,

and a supervisory chain of command. A criminal history background check including fingerprinting, is required prior to a volunteer performing any of the following activities:

- Volunteering as a park or site host
- Supervising or having control over minors, vulnerable populations and communities (youth, elderly, persons with disabilities, etc.)
- Having independent access to security systems, warehouses, master keys, locked offices, or expensive equipment
- Participating in other activities which require background checks per local, State, and federal law regarding volunteer positions

Health questionnaires must be completed by all new long-term volunteers. Human Resources will make a determination as to whether any described conditions or limitations will impact the volunteer's ability to safely complete the tasks identified in the duty statement. Volunteer training will be required and is a continuous process that starts with an initial onsite training, followed by periodic ongoing or refresher training that will be incorporated in volunteer activities. With Board approval the Conservancy may cover long-term volunteers for workers' compensation insurance when such volunteers are properly registered and working within the scope of their assigned duties. Short-term volunteers (individual volunteer hours for a job duty is less than 24 hours over the course of a fiscal year), are not covered by workers' compensation insurance.

#### **IV. Separation Procedures and Documentation**

Separation procedures and documentation detail Conservancy and State policies on separation and termination of volunteers. Either the Conservancy or the volunteer may terminate the *Volunteer Service Agreement* at any time and without cause.

### **Implementation**

If adopted by the Board, the Volunteer Program Guidelines will become effective immediately and will be posted on the Conservancy website at the end of March 2014.

### **Evaluation**

The Volunteer Program Guidelines communicate the objectives and policies for a volunteer program at the Conservancy. The Guidelines are consistent with Conservancy strategic plan priorities and the California State Government Volunteers Act (Government Code §§3110 -3119.2).

## **Legal Authority**

Adoption of the Volunteer Program Guidelines is authorized under Government Code section 3119, where authority is granted to State agencies to utilize volunteers, with specific and general requirements including to provide adequate staff support, establish certain rules, and ensure that volunteers and staff understand their duties and responsibilities within this framework.

## **Compliance with the California Environmental Quality Act**

The proposed action is not an activity which has the potential of causing either a direct physical change in the environment or a reasonable foreseeable indirect physical change in the environment. Accordingly, the action is not a "project" within the meaning of CEQA, and thus does not fall within the purview of CEQA. Therefore, no CEQA analysis is required.

### **List of Attachments:**

Attachment 1 - Proposed Volunteer Program Guidelines

Attachment 2 - Resolution 14-03-02

### **Conservancy Staff Contact:**

Kevin Prior

(530) 543-6016

kevin.prior@tahoe.ca.gov

CALIFORNIA TAHOE CONSERVANCY  
VOLUNTEER PROGRAM GUIDELINES



**March 20, 2014**

*Direct all inquiries and correspondence to:*

California Tahoe Conservancy  
Volunteer Programs Coordinator  
1061 Third Street  
South Lake Tahoe, CA 96150

530-542-5580  
[www.tahoe.ca.gov](http://www.tahoe.ca.gov)

## Table of Contents

	Page
I. Introduction	
a. Purpose	3
b. Mission Statement	3
c. How to Use the Conservancy Volunteer Guidelines	3
d. Legal Authority and Requirements	3
e. Defining a Volunteer	3
f. The Value of Volunteers	4
g. Volunteer Opportunities	4
II. Effective Management and Development of Volunteer Programs	
a. Volunteer Programs Coordinator	4
b. Needs Assessment	5
c. Assessment and Review	5
d. Reporting	6
III. Policies and Procedures	
a. Short- and Long-Term Volunteers	6
b. Registration and Sign-in	6
c. Volunteer Service Agreement	6
d. Duty Statements	7
e. Recruitment and Placement	8
f. Volunteer Eligibility	8
g. Screening	10
h. Background Checks	10
i. Medical Clearance	11
j. Training	11
k. Motor Vehicle Operation	12
l. Use of Privately Owned Vehicles	13
m. Vehicle Insurance	13
n. Reporting Vehicle Accidents	13
o. Use of Personal Property	14
p. Volunteer Uniform Policy	14
q. Travel Expense Claims	14
r. Use of Firearms, Ammunition	15
s. Intellectual Property	15
t. Supervision	15
u. Risk Management	16
v. Reporting Accidents	16
w. Insurance	17
x. Workers' Compensation	18
y. Tort Liability	18
z. School Interns	18
IV. Separation Procedures and Documentation	

a. Separation	18
b. Termination	19
c. Documentation	19
d. Returning Passes/Keys	19
e. Exit Interview	19
V. Appendix - State codes	20

## I. Introduction

### a. The California Tahoe Conservancy Volunteer Program

The volunteer program provides an organized, efficient, cost-effective, and legal approach to managing a wide range of volunteers at the California Tahoe Conservancy (Conservancy).

### b. Mission Statement

The mission of the Conservancy is to lead California's efforts to restore and enhance the extraordinary natural and recreational resources of the Lake Tahoe Basin. The volunteer program shall further the mission of the Conservancy.

### c. How to Use the Conservancy Volunteer Guidelines

This handbook is designed to assist Conservancy staff in managing a volunteer program. Specifically, volunteers and Conservancy employees should refer to the policies and procedures explained in this document to guide them in developing and implementing their volunteer programs. Readers should also refer to the State Administrative Manual (SAM), and applicable State Notices.

### d. Legal Authority and Requirements

In 1978, with the passage of the California State Government Volunteers Act (Government Code §§3110 -3119.2), the Governor and the Legislature recognized the value of volunteerism to State government and all of California with the passage of the California State Government Volunteers Act (Government Code §§3110 -3119.2). These guidelines were developed in compliance with the Act and applicable state policy and regulations.

### e. Defining a Volunteer

Pursuant to Government Code section 3111(a), a volunteer is an individual who, of his or her own free will, and without compensation or financial gain, contributes goods or services to assist (the Conservancy) in the accomplishment of its mission. A volunteer serves under the direction of appropriate Conservancy personnel. A volunteer is not considered an employee within the legal meaning of the term and does not have the same rights as an employee.

#### f. The Value of Volunteers

Volunteers provide many advantages to the Conservancy. Enabling people in the community to be actively involved with Conservancy programs increases public support for the Conservancy and helps people better understand management decisions. Volunteers can enhance existing programs or begin new projects at a minimal cost to taxpayers. They can provide service on a temporary basis or a long-term commitment. Often they bring expertise that is not otherwise present at the Conservancy. Groups of volunteers may be recruited for projects that relate to their specific organizational goals and interests. Effective volunteer programs are in the best interest of the Conservancy and the public.

#### g. Volunteer Opportunities

Individuals in the Volunteer Program perform a variety of duties that assist staff and enhance services. The variety of activities that volunteers assist with and engage in is as diverse as the backgrounds and interests of the volunteers themselves.

## **II. Effective Management and Development of a Volunteer Program**

The management of the Conservancy's volunteer program is a multi-level task, with overall guidelines and policy development established and maintained by the Administrative Officer through the Volunteer Program Coordinator.

#### a. Volunteer Program Coordinator

The Conservancy's Volunteer Program Coordinator:

- Provides support for Executive Director and other executive level employees in their review of the volunteer activities and policy issues;
- Provides support and coordination in the implementation of volunteer activities;
- Initiates and develops training classes pertinent to volunteer program activities;
- Advocates, supports, and promotes the Conservancy volunteer program; and
- Develops and distributes forms, passes, and guidelines that assist volunteer activities.

While non-supervisory staff may provide most of the actual day-to-day oversight of a volunteer activity a few supervisory-specific jobs, such as hiring, firing, and providing formal performance appraisals, must be accomplished by a designated supervisor.

The Volunteer Program Coordinator may delegate Conservancy employee to have coordinator /manager positions to help manage and develop volunteer activities.

Where appropriate, a volunteer or Conservancy employee may act as a volunteer lead to coordinate activities, provided the lead volunteer is under the direct supervision of a paid Conservancy employee and maintains close communication. A volunteer, however, shall not manage or supervise other volunteers.

#### b. Needs Assessment

A needs assessment is a formal investigation of how volunteers can serve the Conservancy and what type of volunteer skills are needed. A well managed volunteer program has the potential to increase the effectiveness of public services, but it will also create some additional demands upon staff time and funding. Volunteers can only be brought in to support and assist staff with their responsibilities.

A volunteer needs assessment should include a list of all the desired projects, tasks or activities where volunteer assistance may be needed. Identify the following:

- Tasks currently performed by staff where assistance is needed
- Tasks not performed by staff members
- Staff activities, which might be done by volunteers when staff is off- duty.

Include all staff in an ongoing evaluation of the Volunteer Program. Follow these steps in conducting a needs assessment:

- Review the list of projects, tasks or activities: the list should be both comprehensive and specific.
- Rank the items according to the commitment of time required on the part of staff to train and supervise volunteers. Include tasks or projects that require specific training or skills not found in existing staff.
- Establish priorities based on Conservancy program needs and the level of support available.

#### c. Assessment and Review

To ensure that staff is effectively managing and developing volunteer activities, volunteers will continuously evaluate the program through periodic assessments and reviews. The periodic assessments and reviews of performance provide vital two-way communication between volunteers and their program leaders and supervisors. Frequent, informal evaluations furnish volunteers with feedback on the quality of their work. Such evaluations also enable supervisors to recognize potential program-wide problem areas that may need to be addressed with additional training or other actions.

The Volunteer Program Coordinator or designee should conduct informal interviews with new volunteers after the first four to six weeks. Include space on the back of the

*Volunteer Service Agreements* to record periodic evaluations. The evaluations can be used as a reference for identifying needed training for current and future volunteers and assignments. Give a written copy of all evaluations to the volunteer.

Allow volunteers to evaluate the program; they can tell the Conservancy what is good and what needs to be improved — things the Conservancy may not necessarily see while working on the “inside.” These evaluations can occur informally through a suggestion box or formally through a survey or an exit interview

#### d. Reporting

The Volunteer Program Coordinator may submit an Annual Volunteer Activities Program Report (includes a summation of each of their volunteer activities). The report will include total volunteer hours (by category), including a narrative synopsis of the previous year's program highlights and problems, as well as general goals for the coming year.

### **III. Policies and Procedures**

#### a. Short and Long Term Volunteers

Volunteers are categorized as either short term or long term. The registration process and insurance coverage differ for each type of volunteer and are described further in the policies.

- Long term volunteer: Individual volunteer hours for a job duty is greater than or equal to 24 hours over the course of a fiscal year.
- Short term volunteer: Individual volunteer hours for a job duty is less than 24 hours over the course of a fiscal year.

#### b. Registration and Sign-in

All volunteers must register using the Volunteer Service Agreement and sign-in before work begins. Organized groups of volunteers should provide a roster of all participants, with names, addresses and phone numbers.

#### c. Volunteer Service Agreement

The Volunteer Service Agreement is a document designed to apply to all volunteers and to address a number of issues including the following:

- Expense reimbursement policies

- Granting the Conservancy copyright privileges to photographs taken of the volunteer while they are serving
- Workers' compensation policies
- Liability issues
- Intellectual property rights
- Volunteer Service Agreement renewal requirements and revision policies
- Drug and alcohol policies
- Termination policies
- Sexual harassment policies

The Conservancy shall develop applicable waivers and service agreements. Waivers function to establish that volunteers serve on a voluntary basis, are aware of safety rules and procedures, release all liability and enter into service at their own risk. A Volunteer Service Agreement may be used as a waiver and adapted for various volunteer positions.

#### d. Duty Statements

Duty statements shall be developed that outline specific volunteer duty responsibilities, performance standards, and supervisory chain of command. It is the responsibility of the Volunteer Program Coordinator to develop clear and concise volunteer duty statements for every position or function.

Duty statements shall identify the task that will be performed and the time commitment that is required. They should define the specific skills and knowledge needed to do a job safely and effectively, including the initial and ongoing training that will be needed to ensure that job performance standards are met. The person or position to whom the volunteer reports should also be included. It is important that the duty statement be clearly written and that each volunteer thoroughly understands his or her responsibilities.

Often several volunteers are needed for a specific job in order to assure proper coverage. In such cases, a single standard duty statement may be written for a number of volunteers.

A typical outline for a duty statement would include the following items:

- Title
- Purpose
- Duties/Responsibilities
- Skills/Qualifications
- Time commitment; length of commitment
- Training and support provided

- Reporting, staff volunteer contact person
- Benefits the volunteer can earn
- Grounds for termination
- Date revised

#### e. Recruitment and Placement

The recruitment and placement of volunteers shall be based on defined job descriptions. Current volunteers are among the best recruitment resources. While considering other recruitment tools, be sure to also advertise the volunteer program and volunteer opportunities on the Conservancy website as well as other volunteer recruitment websites.

Proper screening, interviewing and placement are essential to program success. Volunteers who will serve long-term with the Conservancy will provide high-level (expert) support should be interviewed much like for a paid position. Standard Human Resource protocols shall be applied, as appropriate, to the volunteer position and the term of service.

- Adhere to equal opportunity employment policy.
  - Recruit individuals regardless of age, race, sex, national origin, religion, political affiliation, ancestry, disability, medical condition, marital status, or sexual orientation.
- Recruit through personal contact.
  - Recruit at volunteer centers, community club meetings, church, professional societies, conferences and fairs, and media outlets
- Make volunteer opportunities readily available and known to the public.
  - Use social media (Facebook, Twitter, YouTube), e-mails, flyers, posters, ads and articles in newsletters and newspapers
  - Include a specific person's contact information when recruiting (e-mail address, telephone number, or website to refer to)
- Reach people using volunteer tools available.
  - Such as: VolunteerMatch, Volunteer Centers of California, Hands On Network, Take Pride in America

#### f. Volunteer Eligibility

Conservancy volunteers are individuals who, without compensation, contribute time and service to assist in the accomplishment of the Conservancy's mission. They may be individuals or part of a group.

- Individuals: Volunteers are recruited without regard to race, religion, color, ancestry, gender, sexual orientation, age, national origin, or disability.
- Juveniles: Juveniles are defined as individuals under the age of 18. They may serve as volunteers if they provide acceptable written parental or guardian consent. Work permits are not required, but are recommended. All appropriate labor laws governing the work hours of juveniles must be followed.
- Formally Organized Groups: Formal organizations such as Boy Scouts, Girl Scouts, school groups, public and privately held companies, nonprofit corporations, and other organizations that maintain liability insurance policies may apply. The organization's liability insurance coverage must meet the minimum required for a special event as described under Conservancy Special Use guidelines. Under certain conditions where the benefit clearly outweighs the risk, the Executive Director may waive the insurance requirement.
- Conservancy employees are eligible to participate as volunteers, but they may not participate in duties that they are normally paid to perform. Conservancy employees must sign a *Volunteer Service Agreement* and be treated like other volunteers with regard to duty statements, standards of conduct, and all other administrative matters. The Fair Labor Standards Act prohibits state employees from participating in duties that they are normally paid to perform within the scope of their employment. This includes duties that would appropriately be assigned based on the class specifications, in addition to those on the employee's duty statement.
- Employees' Family Members: Family members of Conservancy employees may perform volunteer services as long as the appropriate forms are completed and approved by a non-family member.
- Former Conservancy Employees may provide volunteer services under the following conditions:
  - The services provided are consistent with those stated in this policy.
  - The former employee has been clearly separated from the department for at least one full pay period.
  - The former employee left the Conservancy on good terms.
  - The former employee shall not, to the extent possible, be assigned to volunteer duties that they previously performed or could have performed while employed by the department.
  - No Conservancy employee shall coerce or pressure any former employee to provide volunteer services. A Conservancy employee who accepts volunteer services from a former employee shall inform the former employee that the Conservancy may not provide preferential treatment in any hiring decisions.
  - Volunteers, whether former employees or new hires, shall cease providing volunteer services one full pay period prior to applying for or being hired for any position with the department.

#### g. Screening

Discrimination is not allowed in the screening process of applicants. Applicants should fill out an application before participating in volunteer programs to ensure proper placement of volunteers and program success.

- "California Tahoe Conservancy Volunteer Application": provides basic data for screening volunteers

There is no obligation to accept everyone who wants to volunteer.

#### h. Background Checks

Some duties that volunteers may perform will require that criminal history checks be completed prior to being accepted into these positions. This procedure can take from two weeks to two months to complete, depending upon whether or not "expedited" processing (for an extra fee) is selected.

A prospective volunteer should complete the California Tahoe Conservancy Volunteer Application, which requests permission from the volunteer for completion of a background check. The volunteer should complete the certification section only if a background check is required. A criminal history background check including fingerprinting, is required prior to a volunteer performing any of the following activities

- Volunteering as a park or site host
- Supervising or having control over minors, vulnerable populations and communities (youth, elderly, differently-abled, etc.)
- Having independent access to security systems, warehouses, master keys, locked offices, or expensive equipment
- All other applicable background check requirements required by local, State, and federal law regarding volunteer positions

A background check should include a Live Scan with the following entities:

- Department of Justice
- Federal Bureau of Investigations
- Child Abuse Central Index
- California Department of Motor Vehicles

The Conservancy may determine if a Live Scan background check is required or can be authorized by filling out and submitting the *Application for Authorization Pursuant to State Statue* and mailing to:

Department of Justice  
Record Access and Security Program  
P.O. Box 903387  
Sacramento, CA 94203-3870

The volunteer may not begin his/her position conditionally while paperwork is being processed.

All background checks will be reviewed and approved or denied by the Human Resources Unit.

The costs associated with a background check shall be paid by the Conservancy.

i. Medical Clearance

Health questionnaires must be completed by all new long-term volunteers and handled in the following manner:

- The prospective volunteer must complete a *Health Questionnaire (STD 910)* which, as a confidential document, is submitted directly to Human Resources. Human Resources will make a determination as to whether or not the described condition or limitation will impact either the volunteer's ability to safely complete the tasks identified in the duty statement, or whether it might place the volunteer in an unsafe work situation. If it is determined that no significant risk exists, then the volunteer should be allowed to participate.

All documents containing personal information collected from volunteer applicants will be accorded the same procedures and protections for maintenance of confidentiality as the Conservancy accords to employees and job applicants. Maintaining the confidentiality of personal information collected from volunteers or volunteer applicants is required under the Information Practices Act, which does not differentiate between employees and volunteers with regard to confidentiality.

A prospective volunteer who is awaiting a determination on a health questionnaire shall not be allowed to begin volunteer service prior to receiving proper medical clearance. If deemed appropriate by Human Resources, a prospective volunteer may begin the classroom elements of volunteer training while awaiting final medical clearance.

j. Training

Volunteer training is a continuous process that first starts with an initial onsite training, and then periodic ongoing or refresher training should also be incorporated in the

Conservancy Volunteer Program. At a minimum, training for long term volunteers will consist of the following:

- Clearly identifying the knowledge and skills for the position that need to be learned or refined
- First-Aid and CPR training
- Defensive Driver training if the Volunteer Duty Statement may require a volunteer to drive a Conservancy vehicle

k. Motor Vehicle Operation

Volunteers may operate Conservancy motor vehicles on Conservancy business when authorized by the Volunteer Program Coordinator and when there is an approved job description outlining specific vehicle use. Volunteers should be subject to the same legal and administrative requirements as Conservancy employees.

Prior to a volunteer operating a Conservancy vehicle or driving a private vehicle on official Conservancy business, the Volunteer Program Coordinator should:

- Verify that the volunteer is at least 18 years old and has a valid California driver license.  
Conduct a driving record check through the California Department of Motor Vehicles for California residents. Use the *Government Agency Request for Driver License/Identification Record Information* (INF 254 Appendix 1.D.1).
- Ensure that the volunteer has successfully completed a driver training course recognized by the State. In accordance with the State Administrative Manual (SAM) Sections 0751 & 0752, all state employees who frequently drive on state business should successfully complete an approved defensive driver training course once every four (4) years.
- Brief the volunteer on proper vehicle operation, maintenance and safety, including seat belt use and accident reporting requirements including the following items:
  - California law prohibits all drivers from using a handheld wireless telephone while operating a motor vehicle unless that telephone is specifically designed and configured to allow hands-free listening and talking. If you must make a call or answer the phone, it is required that you first pull over to a safe location off the highway. Conservancy policy and State law prohibit text messaging while driving a vehicle.
  - Carrying in the vehicle any persons other than those directly involved with official Conservancy business is prohibited unless permission is obtained in advance for each trip by the Volunteer Program Coordinator.
  - Smoking is prohibited in all Conservancy owned vehicles.
  - Pets are not allowed in Conservancy vehicles.
- Use the vehicles calendar located in the Outlook public folders to reserve a specific vehicle on specific dates.

## I. Use of Privately Owned Vehicles

Volunteers may use their privately owned vehicles on Conservancy business if authorized by the Volunteer Program Coordinator. A valid driver's license is required if driving on Conservancy business. The appropriate authority should approve *An Authorization to Use Privately Owned Vehicles on State Business* prior to the use of any privately owned vehicle by a volunteer (Std. 261).

### m. Vehicle Insurance

Under California Vehicle Code, Vehicle Code, (17151 – 17159) the driver of a vehicle has the primary liability for accidents arising out of maintenance or use of that vehicle. Private vehicle accidents should be reported to the volunteer driver's insurance company. The driver's insurance company is obligated to provide defense and indemnification for claims, up to the limits prescribed in Vehicle Code 17150 and 17151, as referenced in. State liability, if any, is secondary.

### n. Reporting Vehicle Accidents

In the event of an accident in a Conservancy vehicle or in personal vehicle while on Conservancy business, volunteer drivers shall obtain the other party's information, i.e., name, address, insurance carrier, and notify the Volunteer Program Coordinator immediately. The Office of Risk and Insurance Management (ORIM) must also be notified within 48 hours or within 24 hours if there is bodily injury. The Accident Identification form, STD. 269, is located on the DGS website ([dgs.ca.gov](http://dgs.ca.gov)). Volunteers must complete a Report of Vehicle Accident, STD. 270, and submit to the Volunteer Programs Coordinator for review as noted on the STD. 270.

- At the accident scene, volunteers should not discuss fault. Volunteers should not promise that the Conservancy will pay for any damages. Using the STD. 269 card that should be in the vehicle glove compartment, the volunteer shall write down as much information as the volunteer can. Tear off the perforated part and give it to the other driver so he/she will know who you are and how to contact the Conservancy.
- If there were injuries to non-state parties, or if the other party suffered significant property damage, report the accident to ORIM by telephone at (916) 376-5302. Complete the Std 270 as soon as possible. The Volunteer Program Coordinator shall review the STD. 270 and sign it.
- Immediately FAX a copy of the accident report (signed by volunteer and Volunteer Program Coordinator) to the ORIM at 916-376-5277.

The Volunteer Program Coordinator or appropriate Conservancy supervisor shall:

- Review and co-sign the Vehicle Accident Report (STD. 270) to attest to the fact that the volunteer was on official Conservancy business.
- Investigate the accident to determine if it was preventable.
- Complete the Supervisor's Review of Motor Vehicle Accident (STD. 274).
- Mail Std 274 to the ORIM at the following address:

ORIM, Claims Unit  
707 Third Street, First Floor  
West Sacramento, CA 95605

o. Use of Personal Property

Volunteers should be discouraged from using personal property or equipment while conducting Conservancy business. Should any personal property such as vehicles, computers, binoculars, cameras, flashlights, and bicycles, be lost, damaged or stolen while being used on Conservancy business, the Conservancy cannot be held liable. Volunteers shall not borrow Conservancy equipment for personal use. Such unauthorized use of Conservancy owned equipment may result in termination of a volunteer's active status.

p. Volunteer Uniform Policy

Uniforms can be as simple as a volunteer patch developed by the Conservancy or a name badge, or a specific shirt and hat, or as complex as full uniform. The Volunteer Program Coordinator will be responsible for determining appropriate dress codes/uniform policy and will detail the uniform required in the duty statement. All uniforms are subject to approval by the Executive Director of the Conservancy.

q. Travel Expense Claims

Volunteers are responsible for any personal costs incurred through their service as a volunteer with the Conservancy. However, the Volunteer Program Coordinator may authorize reimbursement to volunteers of approved travel-related expenses. Reimbursement limits for meals and lodging for volunteers are the same as for Conservancy employees.

Volunteers should be reimbursed for travel expenses under the following conditions:

- The Volunteer Program Coordinator lists travel as a specific duty on the volunteer's job description and pre-approves travel assignments.
- Volunteers must purchase the least expensive round-trip or special rate ticket available. Otherwise the difference will be deducted from the claim. If the volunteer travels between the same points without using round-trip tickets, an explanation should be given.
- The volunteer completes and submits an approved Travel Expense Claim (TEC).

r. Use of Firearms, Ammunition

Volunteers are not authorized to handle contemporary firearms and/or ammunition while serving as a volunteer, even if they hold permits for those materials.

s. Intellectual Property

The Conservancy owns the intellectual property rights to things created by volunteers (within the scope of their agreement/contract).

t. Supervision

To ensure the success and productivity of a volunteer program, the Conservancy should make such provisions as providing adequate equipment and supplies, offering appropriate training, management and supervision, and striving to extend meaningful work opportunities that make full use of volunteers' unique skills. To further maintain a productive and healthy work environment, establish and make clear the roles and rights of both the volunteer and the Conservancy. Consider the following points on the chart below:

Volunteer and Conservancy Supervision, Rights and Responsibility

<b>Volunteer Has the Right to:</b>	<b>Conservancy Has the Right to:</b>
A role description and agreed upon hours	Set the parameters and guidelines of the volunteer positions
Appropriate training, orientation and support	Make decisions re: replacement of volunteers
Accurate and truthful information about the organization	Review volunteer performance according to Conservancy policies
A copy the organization's volunteer policy, or policy and procedures that affect the volunteer role	Expect volunteers to perform tasks to the best of their abilities
Have confidential and personal information handled in accordance with State and federal law	Expect volunteers to be prompt, reliable, courteous, and respectful
Be treated in accordance with equal opportunity and anti-discrimination legislation	Release a volunteer not appropriate for the position
<b>Volunteer Has the Responsibility to:</b>	<b>Conservancy Has the Responsibility to:</b>
Undertake training as required	Provide orientation and training
Carry out the tasks of the position according to the position description	Provide any required, related documentation
Ask for support as needed	Provide clear outline of volunteer duties
Raise any issues to Conservancy may have with the organization through proper channels	Provide supervision and support of volunteers
Give advance notice before absences	Provide complaint and conflict resolution procedures
Respect confidentiality	Include volunteers in relevant decision making processes

Demonstrate courtesy, accountability, and reliability		Provide safe, healthy working conditions
Be committed to the organization		
Give notice before leaving the organization		

u. Risk Management

The reduction of on-the-job accident-related injuries to volunteers is the responsibility of all Conservancy employees and volunteers. Specific risk management strategies that must be incorporated into volunteer programs include:

- Proper supervision: Both a legal requirement and a good management tool, effective supervision helps ensure that the volunteer program continues to meet its goals.
- Ongoing training: To ensure that all volunteers are well versed in safe work practices, initial and ongoing training is mandatory.
- Time Tracking: Provide adequate documentation as to when volunteers are on duty.
- Accident reports: Immediately report all accidents and injuries on authorized forms, and thoroughly investigate and document the circumstances surrounding the accident.
- Ongoing analysis: All accidents and injuries must be investigated to determine what factors, conditions or practices contributed to the incidents, so proper and timely actions can be taken to prevent or reduce the risk of reoccurrence.

Risk management imposes constraints on certain types of volunteer work assignments. While volunteers must observe the same safety precautions as employees, any use of volunteers in jobs considered hazardous for Conservancy employees must be carefully evaluated. The following policies apply:

- Volunteers shall not perform physical law enforcement activities, nor shall they be assigned to duties that place them in life-threatening situations, even as observers.
- Volunteers shall not be assigned to do work that they do not feel comfortable completing, or do not willingly agree to perform.
- The Volunteer Program Coordinator must provide adequate first aid training and CPR to long term volunteers.

v. Reporting Accidents (other than Motor Vehicle)

Report all accidents and injuries within 48 hours of the incident to Human Resources, using the form *Accident Report (Other than Motor Vehicle)*. Thoroughly investigate and describe the circumstances surrounding the accident, including injured party information, property damage/loss information, and witness information.

The *Accident Report (Other than Motor Vehicle)* is a confidential document, and under no circumstances should information be given to anyone except authorized state officials. Refer to State Administrative Manual, Section 2400 and 2455, for detailed information on reporting an accident.

#### w. Insurance

No work is so important that it should be undertaken in an unsafe manner, which may result in injury. Besides the obvious pain and lost work time, such incidents can result in costly workers' compensation claims. Further, unsafe actions of a volunteer which result in injuries to another volunteer or to the public can result in tort claims filed against the volunteer and the Conservancy. Understanding the Conservancy's workers' compensation and tort liability policies is important in the proper management of the volunteer program.

Organized volunteer groups affiliated with recognized organizations such as Girl scouts and Boy scouts, civic and nonprofit organizations, corporations or small businesses, must provide proof of insurance in compliance with the following requirements:

- The certificate of insurance shall be:
  - written in a form acceptable to the Conservancy.
  - written by an insurer acceptable to the Conservancy.
  - maintained at the sole expense of the group.
  - in full force for the complete term of the volunteer activity.
  - primary, and not in excess to any insurance carried by the Conservancy.
  - prepared on an appropriate ACORD form or a certified copy of the original policy,
  - including all endorsements.
- General Liability Coverage: The group shall procure commercial general liability insurance covering bodily injury, property damage, and personal injury with limits not less than \$1,000,000 per occurrence and \$2,000,000 general aggregate. The policy shall apply separately to each insured against whom any claim is made or suit is brought subject to group's limits of liability.
- The following endorsements must appear on the certificate of insurance:
  - Cancellation: The insurer will not cancel the insured's coverage without 30 days prior written notice to the department, except in the case of cancellation for nonpayment of premiums, in which instance the insurer shall give the Conservancy 10 days written notice prior to the effective date of cancellation.
  - Additional Insured: The Conservancy, its officers, agents, and employees are included as additional insured, but only insofar as the operations under this agreement are concerned.
  - Premiums: The Conservancy will not be responsible for any premiums or assessment on the policy.

Under certain conditions where the benefit clearly outweighs the risk, the Executive Director may waive the insurance requirement.

#### x. Workers' Compensation

Workers' compensation insurance is a State mandated benefit provided by employers to their employees. Although volunteers are not Conservancy employees, they are covered under this program if the Board elects coverage for certain volunteers. This program provides compensation for physical injuries and other medically related disabilities occurring within the course and scope of the volunteer position. Each claim is reviewed on a case by case basis to determine eligibility.

With Board approval, the Conservancy may cover long term volunteers for workers' compensation insurance when such volunteers are properly registered and working within the scope of their assigned duties.

Short term volunteers (individual volunteer hours for a job duty is less than 24 hours over the course of a fiscal year), are not covered by workers' compensation insurance.

#### y. Tort Liability

Tort liability, as applied to volunteer management, is generally defined as an action by a volunteer, which results in personal injury to another person or damage to the property of another. When a volunteer is acting within the accepted limits and scope of his or her assigned job responsibilities, the Conservancy may be required to assume responsibility for tort liability claims against a short-term or long-term volunteer's actions which may have done harm to an individual or to their personal property. The Conservancy's obligation to cover a volunteer in any particular instance is reviewed on a case-by case basis.

#### z. School Interns

Subject to Conservancy Board approval, school interns who volunteer their time and are registered as long-term volunteers will be covered by workers' compensation and tort liability, subject to case review and acceptance, through Human Resources. Students whose salaries are paid by outside entities (a university or college foundation, e.g.) are covered by workers' compensation through the entity with which they are affiliated and are not volunteers.

### **IV. Separation Procedures and Documentation**

#### a. Separation

Volunteers may decide to end their service for a wide range of reasons, including the completion of a specific project, relocation to another area, personal or family obligations, or a career/job change. A notation summarizing the reasons for separation,

and any letter of resignation, should be attached to the *Volunteer Service Agreement*, for future reference.

b. Termination

Either the Conservancy or the volunteer may terminate the *Volunteer Service Agreement* at any time and without cause. The Conservancy is not required to accept or retain any person who volunteers his or her services. It remains both the prerogative and the responsibility of the Conservancy to determine whether a specific volunteer or volunteer group is appropriate for its needs and requirements.

If necessary, the Volunteer Program Coordinator can terminate the agreement if the volunteer repeatedly fails to fulfill his or her responsibilities as specified on the *Volunteer Service Agreement* and position description, if he or she violates department policies related to discrimination or harassment, or if he or she is not performing satisfactorily. When a volunteer's services are terminated, both the supervisor and the volunteer should sign the *Volunteer Service Agreement*, although the volunteer's signature is not required.

c. Documentation

Human Resources should complete the separation sections on the lower half of the *Volunteer Service Agreement* to document the termination. The completed *Volunteer Service Agreement* and its attached documentation, including the job description, should be retained for five years following a volunteer's separation. If the volunteer intends to use his or her work experience as a means of qualifying for a job either in or outside the Conservancy, the volunteer may request and the supervisor may provide a letter verifying the type of work performed.

d. Returning Passes/Keys

Volunteers should return passes/keys to access Conservancy property upon separation. Passes to special events or other items given as a reward for volunteering should be viewed as the property of the volunteers unless stated otherwise.

e. Exit Interview

An exit interview can be helpful to both the volunteer and the Conservancy to conduct when an individual terminates service. It is critical to also solicit feedback from

volunteers; have them evaluate the program in addition to the department evaluating them.

*Content contributed by: California Volunteers and California State Parks*

## **V. Appendix - California Codes**

<b>State Policies</b>	<b>Source</b>	<b>Link</b>
California Government Code: California State Volunteers Act	Gov. Code §§3110 -3119.2	<a href="http://leginfo.legislature.ca.gov/faces/codes.xhtml">http://leginfo.legislature.ca.gov/faces/codes.xhtml</a>
California Vehicle Code	Vehicle Code §§17150 - 17159	<a href="http://leginfo.legislature.ca.gov/faces/codes.xhtml">http://leginfo.legislature.ca.gov/faces/codes.xhtml</a>

**ATTACHMENT 2**

California Tahoe Conservancy  
Resolution  
14-03-02  
Adopted: March 20, 2014

**ADOPTION OF CONSERVANCY VOLUNTEER PROGRAM GUIDELINES**

Staff recommends the California Tahoe Conservancy adopt the following resolution:

"The California Tahoe Conservancy hereby authorizes adoption of Conservancy Volunteer Program Guidelines."

I hereby certify that the foregoing is a true and correct copy of the resolution duly and regularly adopted by the California Tahoe Conservancy at a meeting thereof held on the 20<sup>th</sup> day of March 2014.

In WITNESS THEREOF, I have hereunto set my hand this 20<sup>th</sup> day of March 2014.

---

Patrick Wright  
Executive Director