

**Policy No. 1.16**  
**Date of Issuance:**  
**Revision Date:**

**Volunteer Activities**  
**August 15, 2019**

**PURPOSE:** The Town of Rome recognizes that people can make great contributions as volunteers providing support to Town departments in achieving the Town’s mission. It is important that Town employees, officials and agents who involve volunteers to help accomplish the mission of the Town familiarize themselves with the concepts of liability, responsibility, and risk management as they apply to volunteer programs. Each volunteer opportunity in the Town of Rome shall have an employee, official or agent responsible for the oversight and utilization of volunteers for that opportunity. Department Heads are ultimately responsible for compliance with this policy.

**DEFINITIONS:**

**Volunteer.** A person recognized and authorized by the Town of Rome or one of its employees, officials or agents to perform at will services for the Town without receipt of salary or compensation. An individual may not volunteer for the Town when the volunteer hours involve the same type of service which the individual is employed to perform for the Town. For the purposes of this policy an unpaid intern is defined as a volunteer.

**Volunteer Supervisor.** The Volunteer Supervisor is a Town employee, official, agent or volunteer who directly supervises volunteer activities.

**Background Check.** The authentication of the information supplied by an individual in his or her application, including criminal records. Background checks are used as a means of objectively evaluating an individual’s qualifications, character and fitness and to identify potential risks for safety and security reasons. Where conducted, Background checks must substantially relate to the circumstances of the particular job or licensed activity.

**Reference Check.** A request, verbally or in writing, to people who are familiar with some aspect of an individual’s life, insights, experience, personal integrity and ethics and are willing to share what they know. References are personal, professional, or employment related.

**PROCEDURES:**

**1. VOLUNTEER MANAGEMENT AND VOLUNTEER-RELATED RISK MANAGEMENT**

**METHODOLOGY.** Recognizing that good volunteer management is a best practice that reduces risks and enhances the volunteer experience while improving volunteer retention, the Town of Rome requires each department utilizing volunteers to comply with all aspects of this policy, including the maintenance of lists of current certified and bona fide volunteers. All volunteer documentation should be retained for seven years after end of service. Risk management techniques will be used to help control and minimize liability exposures. The main principles of risk management for volunteer programs are good

volunteer program coordination to include intake/screening processes, orientation/training, performance monitoring, good record-keeping, and recognition of volunteer service.

- a. Volunteer Supervisor. Each department utilizing volunteers will designate a Volunteer Supervisor for the department, responsible for compliance with this policy and all other pertinent Town policies.
- b. Volunteer Screening. The proper screening of volunteers serves a dual purpose. It ensures that the volunteer has the necessary skills to carry out the responsibilities of the position and that the responsibilities fit the interests of the volunteer. Proper screening will decrease the possibility of injury to the volunteer, decrease the potential of claims against the volunteer due to negligent performance of responsibilities and reduce the claims against the Town by others served by the volunteer. Screening steps may include completion of the following forms and processes: Volunteer Registration Form & Waiver, interviews, background checks and reference checks, Screening will be commensurate with the volunteer task and duration of volunteer service. At a minimum, and prior to beginning their volunteer duty, Volunteer Supervisors will maintain a completed Volunteer Registration Form & Waiver, which includes a hold harmless agreement for each volunteer. Volunteer Supervisors will also maintain a Volunteer Roster with tasks and hours of service for all volunteers. A more extensive screening, including interview and background check(s) will be required for volunteers that assist with vulnerable populations. All screening forms and information should be retained by the department's designated Volunteer Supervisor for seven years after end of service.
- c. Volunteer Groups. In situations where a large group or third-party organization is volunteering, it will still be necessary to complete the Volunteer Registration form, with the Hold Harmless Agreement at a minimum. Best practice is to have a separate written agreement or contract outlining the duties/responsibilities of the organization, with the written agreement being approved by the Town Attorney. The Volunteer Registration Form & Waiver should be part of any written agreement.
- d. Volunteers under age 18 and Prospective Volunteers Who Have Guardians. Waivers for youth volunteers (age 17 and under) will be signed by guardians. The Town Administrator will act as a resource, on a case-by-case basis, to advise departments on screening, permissions, and other special circumstances related to youth or other unique volunteer situations.

## **2. LIABILITY EXPOSURES AND PROTECTION.**

- a. General Liability Insurance. The Town's general liability insurance policy provides that any expressly authorized volunteer of the Town is covered by the policy for accidents, subject to its terms, conditions, and exclusions. This includes payment of reasonable expenses, regardless of fault, for first aid administered at the time of the accident, necessary medical, surgical, x-ray and dental services, and necessary ambulance, hospital, professional nursing and funeral services. Payment of medical expenses for "bodily injury" caused by an accident within the coverage territory (on Town property and adjacent ways) shall be subject to expenses incurred and reported to the insurance within one (1) year of the date of the accident, and the injured person submitting to physician examination, if requested by the Town's insurance provider. Any other claims against the Town beyond the insurance limits of this paragraph are waived by the volunteer.
- b. Automobile Liability Insurance. The Town's automobile liability insurance policy provides that anyone is an insured, subject to policy terms, conditions, and exclusions, while using a Town-owned vehicle with the Town's permission and acting within the scope of their volunteer duties for the Town. Any volunteer using a Town-owned vehicle must comply with the Personal Use of Town Property Policy. For automobiles owned by a volunteer, the Town's automobile liability policy provides that any volunteer expressly authorized by the Town is an insured under the policy provisions with respect to the use of an automobile owned by the volunteer to conduct Town business, and only while operating the automobile within the scope of their duties for the Town. Policy coverage does not extend to personal use or transportation to or from the volunteer activity. Such insurance protection is secondary, or excess, over any other insurance available to the volunteer. The Town does not provide protection to the volunteer for damage to his or her own automobile.
- c. Worker's Compensation Insurance. Volunteers are not covered under the Town's Worker's Compensation Policy.

### **3. VOLUNTEER APPLICATION PROCEDURES.**

- a. Completion of Volunteer Registration Form & Waiver. At a minimum a Volunteer Registration Form & Waiver must be completed prior to the volunteer beginning performance of volunteer duties. This form will be made available to each department's Volunteer Supervisor and/or can be obtained from the Town's website. Limited term (such as a one-day special project) volunteers still need to complete a Volunteer Registration Form & Waiver.
- b. Additional Information. If the department's Volunteer Supervisor needs additional information about a volunteer in order to better understand what interests him/her, submission of additional materials, such as resume, references, or criminal history is necessary.

- c. Interviews. The interview provides Town staff with an opportunity to clarify information provided by an individual and allows the volunteer to offer additional information about his/her interests and skills that may be difficult to reduce to writing on an application.
  - d. Background Checks and Reference Checks. Background checks and reference checks are required for volunteers who will be provided keys to access Town facilities outside of regular business hours, will be assisting citizens or working directly with children and/or vulnerable adult populations. The only exception to these requirements is addressed in the Volunteer Groups section above where an agreement with an organization states that the group will complete background checks as part of a stated agreement. Completion of a background check and reference check is at the discretion of the Volunteer Supervisor, using the Town Administrator for guidance in uncertain situations. The costs of background checks will be covered by respective departments. Results of background checks and reference checks should be retained by the department's designated Volunteer Supervisor for seven years after end of service.
  - g. Computer Acceptable Use Policy. Volunteers who will be using a Town-owned computer or who will have access to the Town's computing and network resources to perform volunteer duties are subject to the Town's computer, internet and email acceptable use policy.
  - h. Personal Conduct Policy. Volunteers are expected to conduct themselves in accordance with the applicable standards of the Town's personal conduct policy. These standards will be overviewed (formally or informally) during a volunteer's orientation and training. The Volunteer Supervisor shall determine the level overview of the personal conduct policy based on the nature and complexity of a volunteer's responsibilities.
  - i. Welcome Letter. Issuing a welcome letter accepts the volunteer into the department and provides a written record of the individual as a person authorized to provide services on behalf of the Town. A welcome letter template is provided by the Town Administrator upon request.
- 4. VOLUNTEER ORIENTATION AND TRAINING.** Orientation and Training of volunteers ensures that they have the necessary skills and confidence to carry out their responsibilities and will help minimize incidents involving the volunteer or persons working with or served by volunteers, and will deter claims against the volunteers and the Town. Written documentation of all training and instructions given to each volunteer should be kept on file for seven years after end of service.

- a. Volunteer Instruction. All volunteers should receive instruction on how to carry out their responsibilities. The instruction given will vary depending on the nature and complexity of the volunteer's responsibilities. Instruction methods may include informal orientation, hands-on instruction, job site performance coaching and skills training, or a formalized training program with prepared training manuals. The Volunteer Supervisor shall be responsible for appropriate volunteer instruction.
  - b. Safety Policies and Procedures. Volunteers must be instructed in pertinent safety policies and procedures including such items as emergency evacuation, safety rules, and proper use of equipment. Records of any safety information/training provided/received must be kept on file for seven years after end of service with the volunteer name and date received.
  - c. Incident/Accident Reporting. Volunteers will be instructed to report to their Volunteer Supervisor as soon as possible all incidents or accidents they are involved with during the course of their volunteer responsibilities. Prompt accident investigation is critical to determine possible causal factors and possible corrective actions to prevent such accidents from occurring in the future. Volunteer Supervisors will notify the Town Administrator of within 24 hours of an incident/accident.
- 5. COMPLETION OF VOLUNTEER SERVICE.** A brief letter is required to provide written documentation that volunteer service on behalf of the Town of Rome has ended and the individual or group is no longer authorized to act on behalf of the Town. The volunteer or group must receive a copy of the letter and a copy will be retained by the department for seven years after end of service. When appropriate, this letter can function as a means to honor and document the volunteer service.
- 6. RECOGNITION OF VOLUNTEER SERVICE.** All opportunities for appropriate, meaningful recognition should be taken. In appreciation for valuable contributions, annual recognition events may be held or recognition items like certificates of appreciation or token gifts may be given to honor volunteer contributions, with the value of any single recognition gift or recognition meal no greater than twenty-five dollars (\$25.00) and with a maximum cumulative award value no greater than fifty dollars (\$50.00) per volunteer, per year. Gifts for recognition of a value of greater than twenty-five dollars (\$25.00) are prohibited as well as cash and gift cards/certificates.
- 7. REPORTING REQUIREMENTS.** Annually, per calendar year, any department which has utilized volunteers the prior calendar year will compile a report of a list (by name) of volunteers utilized during the year and summarize the work and hours performed per volunteer along with any means of recognition utilized. This report will be submitted to the

Town Administrator. The Town Administrator will make a volunteer report to the Town Board, by the end of April for the previous calendar year.