STANDARDS FOR UNITS USING VOLUNTEER SERVICES

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INTRODUCTION

The willingness of our volunteers to share their skills and talents is highly appreciated. As we bring volunteers into our community, it is important that we understand our responsibilities to both the volunteer and the University. The following information is meant to educate units on a number of issues relating to volunteers. Part of this process includes the completion of the forms listed in Section IV, Approval Process. The forms and procedures address compliance related to volunteers. Risk Management and Insurance is responsible for the development of processes related to volunteers and for the approval of any exceptions for services critical to the university’s mission or for university signature events. Units that do not complete the Volunteer Qualification process as outlined in the Volunteer Standards prior to the start of volunteer service will not be in compliance with insurance, Human Resources, EHS, International Programs Office and Office of Research Assurances.

Refer all 4H volunteers to 4H. 4H completes the approval process for its volunteers.

COMPLIANCE RELATED TO VOLUNTEERS

The Federal Fair Labor Standards Act (FLSA) allows public agencies, such as the University of Idaho, to use the services of volunteers under certain circumstances, such as:

A. The volunteer cannot perform the same type of services that he or she performs as a University employee, or perform services during normal working hours if the volunteer is employed by UI in any capacity. Note: University employees who are released by their dean/director to perform temporary services for another unit (registration assistance, etc.) while on the University payroll are not typically “volunteers” (individualized analysis is required for those situations).

B. The volunteer must offer his/her services freely and without coercion, direct or implied, from the University.

C. The volunteer must perform service without promise, expectation, or receipt of compensation for his/her services. In some circumstances, volunteers can receive reimbursement for expenses, benefits, or a nominal fee. However, Human Resources (HR) must approve such payment arrangements and receive the appropriate withholding forms.

If any of the above criteria are not met, the services performed may constitute compensable time under the FLSA, and require payment of minimum wages and overtime by the unit.

A. Volunteers will self-identify US citizenship or eligibility for unrestricted employment in the US, unless they are performing a service that no one else is paid to do by completing the UI Information for Volunteers form.

B. Volunteers who will be in contact with minors (under age 18) must be approved by UI Risk Management (UI Risk) and be in compliance with APM 05.12 Protecting Minors, which may include being subject to a criminal background check.

C. Volunteers may not transport groups, students, minors, or non-UI affiliated persons on UI business or UI sponsored events and activities. Exceptions may be made only with prior approval of UI Risk.
D. For volunteers under the age of 18, written permission must be received from UI Risk and HR and from a parent or legal guardian. A waiver will be required with volunteers who are minors. Obtain from UI Risk.

E. No written volunteer agreements may be utilized other than those provided through HR, and the forms required in the volunteer Approval Process (Section IV).

F. Volunteers must be under the direct supervision of a paid University of Idaho employee. Supervision by a University employee means that the volunteer is given the means and the direction for the performance of service.

G. The volunteer should be engaged only where there is a legitimate need for services.

H. Volunteers must be engaged in activities related to the business or operations of the University of Idaho. Such activities are defined as services that furthers the goals and missions of the University in education, research, or community service.

I. Volunteers should have the skills necessary to perform service.

<table>
<thead>
<tr>
<th>Some examples of qualified volunteers:</th>
<th>Some activities where an individual is not generally qualified as a volunteer:</th>
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<tbody>
<tr>
<td>Docents</td>
<td>Employees from other universities or organizations doing joint research, or performing other services and activities with UI</td>
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<tr>
<td>Flower planting or gardening on campus grounds</td>
<td>Students in practicum, internship or work study programs</td>
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<td>Models in art classes</td>
<td>Students on class field trips</td>
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<td>Enrolled and accepted 4-H leaders</td>
<td>Spouses, friends, or family members traveling with a UI employee</td>
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<td>Coaches</td>
<td>Performers in theatre, music, dance, or other productions</td>
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<td>Recreational assistants</td>
<td>Participants in club activities</td>
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<td>Student registration assistants</td>
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**SUPERVISOR RESPONSIBILITIES**

Ensure your volunteers are provided with information about University policies, procedures, and compliance requirements for safety and security; sexual harassment; drug and alcohol abuse; non-discrimination and equal opportunity, etc. Volunteers should also be informed of ethical codes or similar standards of conduct applicable to the unit in which they provide volunteer services, as well as other relevant policies, such as policies on confidentiality of records, intellectual property, conflict of interest, etc. Prior to volunteers performing any services, the unit must complete the Approval Process (Section IV).

Volunteers are not authorized to act in any way on behalf of the University in business or other matters, including purchasing property, signing contracts, leases or other agreements, hiring or supervising employees or otherwise attempting to bind the university to any agreement. Please do not ask them to fill any of those roles.

Volunteers are under no obligation to provide services to the University and are free to discontinue their volunteer activities at any time. Similarly, the University can require that the volunteer discontinue his or her service at any time, without advance notice.
Qualified volunteers are eligible for University of Idaho general liability coverage. General liability provides bodily injury and property damage to “other parties,” (non-UI). Auto coverage is available for authorized volunteers who are also qualified to operate a university vehicle (see APM 5.08 Vehicle Coverage and Use for qualifications). There is NO COVERAGE for injuries to the volunteers or for damage to a volunteer’s personal vehicle. There is NO COVERAGE for workers compensation for volunteers.

APPROVAL PROCESS

Exceptions to the below process must approved in writing by UI Risk and HR.

For all other volunteers, complete the following forms for each volunteer:

A. Volunteer Qualification Checklist (signed by Dean / Director)
   If unit received a referral(s) when completing the Volunteer Qualification Checklist, attach all applicable referring unit approvals to the Volunteer Qualification Checklist prior to obtaining the dean or director’s signature approval.

B. UI Information for Volunteers (signed by volunteer).
   Attached the Information for Volunteer form that has been signed by the volunteer to the Volunteer Qualification Checklist prior to obtaining the dean or director’s signature approval.

Important Note: Refer all 4H volunteers to 4H. 4H completes the approval process for its volunteers.

1. Volunteer Qualification Checklist

   The Volunteer Qualification Checklist is to be completed to ensure the necessary criteria are met for purposes of the Fair Labor Standards Act (FLSA), HR, insurance, IRS, IPO, EHS, Office of Research Assurances, and Risk Management. Questions regarding volunteer status should be directed to RM or HR.

   If, in accordance with the Volunteer Qualification Checklist, the referral approval of HR, UI Risk, IPO, Office of Research Assurances, or EHS is not required, requesting unit would obtain the volunteer’s sign signature on the UI Information for Volunteers form, attached the Information for Volunteers form to the Volunteer Qualification Checklist and seek the signature approval on the Volunteer Qualification Checklist by their dean/director.

   The college or division Dean/Director must sign off on a completed Volunteer Qualification Checklist and approve the volunteer services. The checklist will help units determine whether additional review and approval by HR, IPO, Office of Research Assurances, UI Risk, or EHS is needed.

   The approval of HR, UI Risk, IPO, or EHS is required in the following situations:
   a) International Persons
   b) University employees
   c) Compensated volunteers
   d) Volunteers under age 18
e) Volunteers working with minors (under age 18)
f) Volunteer service outside state of Idaho
g) Volunteers operating vehicles
h) Volunteers in contact with minors

Unit hosting volunteer will keep a copy of this completed form, and if applicable the supporting approval documentation, for two years AFTER volunteer service has been completed. Records related to minors will be retained permanently. Records will be available to applicable resources (i.e., HR, IPO, UI Risk, Office of Research Assurances, or EHS) upon request of those resources.

See Competition of Volunteer Qualification Checklist below for assistance in completing the document.

2. UI Information for Volunteers

After completing the Volunteer Qualification Checklist, and once any applicable referrals have been approved in writing, units must get the volunteer’s signature on UI Information for Volunteers. The “information” form is designed to give volunteers important information about volunteering at UI. After reading the sheet, the volunteer is asked to sign the form to indicate the volunteer has received the information and is an eligible volunteer. Obtain volunteer’s signature on this form.

See Competition of Information for Volunteers form below for assistance in completing the document.

Unit hosting volunteer will keep a copy of this completed form for two years AFTER volunteer service has been completed. Records related to minors will be retained permanently. Records will be available to applicable resources (i.e., HR, IPO, UI Risk, Office of Research Assurances, or EHS) upon request of those resources.

COMPLETION OF VOLUNTEER QUALIFICATION CHECKLIST

The Volunteer Qualification Checklist is an online document found at http://www.uidaho.edu/infrastructure/pss/risk-management/volunteers. Units will be asked to supply the following information:

A. Unit Information –
   1. Requesting unit name,
   2. Unit requester’s name,
   3. Requester’s position title,
   4. Requester’s phone number, and
   5. Requester’s email.

B. Volunteer Information –
   1. Volunteer’s name,
   2. Volunteer’s address,
   3. Volunteer’s phone number,
   4. Volunteer’s email address,
5. Name of UI employee supervising volunteer,
6. Job title of supervising employee,
7. Location(s) of volunteer’s service, (city and state or location name and state if remote.)
8. Date(s) and time(s) of volunteer service, and
9. Specific tasks and duties to be assigned to volunteer.

C. Special Risks –
1. Is the volunteer a US citizen,
2. Is the volunteer a University employee, (if yes, provide current position title, current unit name.),
3. Will volunteer receive any compensation, (if yes, provide comparable position title, comparable position’s hourly wage, non monetary compensation item and value of item, hourly rate of compensation or nominal fee to be paid, expenses to be paid for volunteer, benefits to be extended to volunteer, and a total amount of the previously listed compensation items),
4. Is the volunteer under the age of 18,
5. Will volunteer be working with minors (under age 18),
6. Is any of the volunteer’s service taking place outside of the state of Idaho, (if yes, state the state the volunteer currently resides and the state that the volunteer’s service will take place),
7. Will volunteer drive a vehicle for University business,
8. Will volunteer be in a laboratory environment, and
9. Will volunteer be in contact with animals or genetically modified materials.

D. Volunteer Qualifications –
1. Is another employer paying the volunteer during the dates and times of volunteer service,
2. Is the person authorizing the volunteer services and / or supervising the volunteer a family member or cohabitant of or otherwise presenting a potential conflict of interest with the volunteer,
3. Is the person receiving course credit for their work,
4. Will the volunteer work under the direct supervision of, or be given the means and direction for the performance of work, by a paid UI employee,
5. Will the volunteer perform work where there is a legitimate need for services,
6. Is the work related to the mission or goals of the UI,
7. Does the volunteer appear to have the skills necessary to perform the work, and
8. Is the volunteer performing a service that no one is paid to do.

The requester will submit the completed Volunteer Qualification Checklist by clicking the submit button at the bottom of the online form. The requester will then receive an email with the form attached for them to review for referrals or stop here statements.

A. If requester has no REFERRALS to address, print the Volunteer Qualification Checklist for Dean or Director’s certification as part of your record for this volunteer.

B. If requester has REFERRALS, print the Volunteer Qualification Checklist and contact the unit(s) based on referral message. If the referring unit(s) authorizes and approves the specifically referred item, print their approval and retain with Volunteer Qualification
Checklist. If all referral items have been approved, Dean or Director signs the Volunteer Qualification Checklist certification as part of your record for this volunteer.

Referral items that are not resolved with the referring unit will prohibit the use of the volunteer.

C. If requester received a notice, "Stop here. Volunteer does not qualify.", the service that the unit would like the volunteer to participate in is not eligible for volunteer service.

Documentation for a volunteer’s service should include a dean or director signature approval on the Volunteer Qualification Checklist (including any supporting referral approvals) and the signed Information for Volunteers Document. Volunteer’s service may begin when all documentation is compiled.

COMPLETION OF INFORMATION FOR VOLUNTEERS FORM

The Information for Volunteers form can be found at https://www.uidaho.edu/infrastructure/pss/risk-management/volunteers. Units will be asked to supply the following information:

A. Information regarding the unit the volunteer will be serving in-
   1. UI college & unit names,
   2. UI unit contact name, and
   3. Description of what the volunteer’s service will include.

B. Once the unit has filled in the above information, the form will be given to the volunteer to complete:
   1. Volunteer’s name,
   2. Dates of volunteer service,
   3. Home Address,
   4. Volunteer’s phone or cell phone number,
   5. Volunteer’s email, and
   6. Emergency contact name and phone number.

The volunteer would then sign and date the Information for Volunteers form.

Attached the Information for Volunteers form to the Volunteer Qualification Checklist prior to obtaining dean or director signature approval.

RECORD RETENTION

The completed and signed Volunteer Qualification Checklist (along with any applicable approvals as required by Volunteer Qualification Checklist) and the signed Information for Volunteers should be retained by the unit for two years after the volunteer service is completed. Records related to minors will be retained permanently.

If an incident arises from the volunteer service, HR, IPO, EHS, Office of Research Assurances, or UI Risk will contact the unit for the appropriate forms.