



## **New Volunteer Program Guide now available (and why we shifted from a “handbook”)**

If you joined us at the SDAO 2026 Annual Conference (especially the preconference session), you got the first look at a new resource we’ve been building in response to the steady stream of volunteer questions districts have been navigating.

We’re excited to share that the Volunteer Program Guide has now officially launched and is available to all members. This guide is designed to help districts develop and run volunteer programs that are clear, consistent, and defensible — with practical tools you can actually use.

You may have heard this project described earlier as a “Volunteer Handbook.” As development progressed, we made an intentional shift away from a traditional handbook modeled after an employee handbook. Here’s why: handbook-style language can unintentionally blur the line between volunteerism and employment, and that creates real risk for districts. For example, when volunteer documents start reading like employee rules (set schedules, mandatory hours, discipline-style steps, performance expectations, employee-type promises), it can increase confusion and exposure to risk such as:

- Wage-and-hour and benefit claims: If volunteer rules read like employment requirements (set schedules, mandatory hours, “discipline” processes, performance expectations), it can fuel arguments that volunteers were treated like employees.
- Employee-type promises: Handbook language can accidentally imply rights or protections intended for employees (progressive discipline, grievances, job security, “terms and conditions”), which creates confusion and increases liability.
- Documentation drift: When volunteer issues are handled using employee-style documentation and corrective action language, it strengthens the appearance of an employment relationship.

So instead of a handbook format, the Volunteer Program Guide provides the foundation and guardrails districts most need:

- Practical tools, templates, and guidance to support development and implementation of a volunteer program
- A clear volunteer policy template
- Volunteer acknowledgment template to document expectations and key risk areas

Bottom line: this shift away from a volunteer handbook was purposeful — to reduce risk and give districts a stronger, more usable resource. This document, and the template form a starting point and will require significant work and mediation to fit your District’s needs.

If you have questions about how to roll it out, what to adopt first, or how to tailor it to your program, please reach out.

### **How to Access HR Answers Support**

SDAO members can contact HR Answers directly to use their included consultation hours or inquire about additional services:

Phone: 503-885-9815

Email: [info@hranswers.com](mailto:info@hranswers.com)



# VOLUNTEER PROGRAM GUIDE

SERVICE WITH PURPOSE

## CONTENTS

Introduction .....	3
Build an Intentional Volunteer Program.....	4
Step 1: Write the “Why” so your program has a backbone.....	4
Step 2: Design multiple roles before you recruit—because roles drive everything.....	5
Step 3: Assign ownership and supervision—because volunteers deserve direction.....	6
Step 4: Define the lifecycle so your program runs on process—not personality .....	7
Step 5: Set expectations that protect service delivery and culture .....	8
Step 6: Create a right-sized paper trail that supports consistency and continuity .....	9
Step 7: Build guardrails by role risk—structure should match exposure .....	10
Risk Factors Every District Should Consider .....	11
Program Structure, Boundaries, and Supervision .....	11
1) Role scope creep and blurred boundaries .....	12
2) Working alone and supervision gaps .....	12
3) Screening and selection consistency (fit for role) .....	13
4) Training gaps and inconsistent instructions .....	13
5) Volunteer misconduct, performance issues, and removal.....	14
Public Interface and Community Trust .....	14
1) Public-facing interactions and conflict escalation.....	15
2) Misinformation and “unofficial commitments” .....	15
3) Reputation and public trust .....	15
People, Conduct, and Respectful Workplace.....	16
1) Harassment, discrimination, and respectful workplace conduct .....	17
2) Serving minors or vulnerable populations.....	17
Safety, Incidents, and Emergencies .....	17
1) Safety and physical environment .....	18
2) Medical/first aid response and emergencies.....	18
3) Injuries to volunteers (and reporting expectations).....	19
Information, Records, and Technology .....	19
1) Confidentiality, privacy, and sensitive information exposure .....	20
2) Records and public communications (including email/text) .....	20
3) System access and cybersecurity .....	20
Assets, Money, and Access .....	21

1) Money handling and financial transactions (fees, donations, fundraising) .....	22
2) Use of district property, tools, equipment, and technology .....	22
3) Keys, badges, facilities access, and “who can go where” .....	22
Off-site Work and Transportation .....	23
1) Driving and transportation (district or personal vehicles) .....	23
2) Off-site activities and field work .....	24
Workforce/Labor and Volunteer Status .....	24
1) Volunteer status and “employee-like” expectations.....	25
2) Union/employee relations and displacement concerns.....	25
Volunteer Lifecycle.....	31
Track 1: Program Design & Stewardship .....	31
Track 2: Volunteer Engagement & Operations .....	32
Stage 1: Plan & Recruit.....	33
Stage 2: Screen & Select .....	34
Stage 3: Onboard.....	36
Stage 4: Train & Authorize.....	37
Stage 5: Support & Retain.....	38
Stage 6: Redirect / Pause / Remove.....	39
Stage 7: Exit & Offboard .....	40
Quick look: Volunteer vs. Employee.....	42
Wrap-Up: Building a Volunteer Program That Works on Purpose.....	44
Appendix.....	47
Regulatory and Educational Websites .....	47
Definitions.....	49
Volunteer Policy (Template).....	53
Volunteer Role Description Form (Template) .....	60
Volunteer Role Description Form (Completed Sample) .....	66
Volunteer Application / Intake Profile (Template) .....	70
Volunteer Agreement & Acknowledgements (Template) .....	75

## INTRODUCTION

Volunteerism is one of the most practical ways communities show up for themselves. In Oregon special districts, volunteers expand capacity, strengthen connection to the public, and bring skills and energy that can turn “we wish we could” into “we did.” They also represent your organization in the community, which means a volunteer program is never just a feel-good add-on—it’s a service model that deserves the same thoughtful design you would give to any other part of operations.

This guide is built to help your district create an intentional volunteer program with clear purpose, defined roles, consistent supervision, and a lifecycle you can repeat year after year. We cover the foundational building blocks (mission alignment, role design, expectations, and documentation), the risk factors every district should consider (safety, supervision, boundaries, and recordkeeping), and specialty considerations that show up differently depending on district type (fire, library, soil and water, parks, and more). We also walk through the volunteer lifecycle from recruiting to exit so your program is consistent, fair, and sustainable.

To get the best results, use this guide like a toolkit, not like a novel. Start with the opening sections to confirm your “why,” then move into role design and ownership so you know who is responsible for what. From there, use the checklists, templates, and sample language to build your own program packet, then circle back for the risk considerations to pressure-test your design. Pick one improvement at a time, assign an owner, set a date, and keep the momentum going—small changes stack into a strong program.

One important note: this guide is educational and practical, and it is not legal advice. Your district’s facts, insurance coverage, policies, collective bargaining agreements, and risk tolerance matter, and some volunteer roles raise legal and compliance questions that should be reviewed with your legal counsel and risk partners. Use this guide to build structure and consistency and coordinate with your advisors for any role-specific or situation-specific legal decisions.

## BUILD AN INTENTIONAL VOLUNTEER PROGRAM

Volunteer programs thrive when they're designed, not simply hoped into existence. In Oregon special districts, volunteers often sit close to mission-critical services and public trust. That reality calls for clarity: why volunteers exist in your organization, what work is appropriate for volunteers, how they are supported, and how you manage risk without crushing the spirit of service.

Think of an intentional volunteer program as a service-delivery system: it has inputs (recruiting and onboarding), controls (supervision, training, boundaries), outputs (reliable help that supports the mission), and quality checks (feedback, documentation, and exits when needed). When those pieces are missing, the program tends to run on personalities and heroic effort, and that's where inconsistency, frustration, and preventable risk show up.

What you are building

- Your “baseline” intentional program includes:
- A clear purpose aligned to mission and outcomes
- Defined roles with boundaries and realistic expectations
- Ownership and supervision (someone is accountable, someone is day-to-day)
- A repeatable volunteer lifecycle (recruit → exit)
- Clear expectations for conduct, reliability, and communication
- A right-sized paper trail to support consistency and continuity
- Risk/safety guardrails designed in from the beginning

Let's look at each step of the process with some examples.

### STEP 1: WRITE THE “WHY” SO YOUR PROGRAM HAS A BACKBONE

Volunteer programs tend to drift when the purpose lives in everyone's head and nowhere on paper. A clear purpose statement acts like a decision filter: *What roles should we create? What tasks belong with volunteers? What level of supervision is realistic? What are we willing (and not willing) to risk?*

In a special district, the “why” is more than goodwill. It ties volunteerism to public service outcomes, sets boundaries that protect staff and volunteers, and keeps your program consistent across board changes, staff turnover, and “helpful” one-off ideas.

Do this

- Draft a 4–6 sentence purpose statement that answers:

- What mission outcomes volunteers support
- Where volunteers add value (and where they will not be used)
- What “success” looks like for the public, staff, and volunteers

Example (Program-level: Library District)

“Library District volunteers expand community access to library services by supporting welcoming public spaces, assisting with routine program logistics, and helping patrons connect with general resources. Volunteers complement staff work by increasing capacity for service and community engagement, without replacing core staff responsibilities. Success looks like safe, respectful interactions, accurate general information, consistent volunteer attendance, and clear escalation to staff when needs exceed volunteer scope.”

**STEP 2: DESIGN MULTIPLE ROLES BEFORE YOU RECRUIT—BECAUSE ROLES DRIVE EVERYTHING**

Most districts will have several volunteer roles, not one. If you recruit first and define roles later, you’ll end up building a program around whoever shows up, rather than around the district’s needs and capacity. Defining roles first prevents vague “help out wherever” expectations that create uneven experiences and preventable risk.

Role design also helps you scale: you can offer a mix of low-risk, medium-risk, and higher-skill roles, and you can apply the right level of screening, training, and supervision to each.

Do this

- Identify 3–10 volunteer roles you can realistically support.
- For each role, define:
  - Duties and scope
  - Time expectations and schedule reality
  - Work setting, physical demands, tools used
  - What volunteers are not authorized to do
  - When and how to escalate to staff

Example (Program-level: Library District role set)

- Shelving & Materials Support Volunteer (low risk, task-focused)

- Program Support Volunteer (setup/teardown, sign-in, supplies)
- Customer Service Desk Support Volunteer (public-facing, medium risk)
- Technology Helper Volunteer (higher skill, higher supervision needs)
- Friends/Foundation Event Volunteer (fundraising/events; special guardrails)

Example (Role-specific: Customer Service Volunteer)

- Authorized: greet patrons; answer general “where do I...?” questions; direct to resources; route calls; monitor a shared inbox; use pre-approved templates; log interactions.
- Not authorized: interpret policy; promise outcomes; handle complaints beyond intake; access confidential patron records beyond what’s required; discuss personnel issues; give legal advice; speak to media.
- Escalate to staff when: conflict/escalation, safety concerns, public records requests, media inquiries, anything outside scripts/FAQs.

**STEP 3: ASSIGN OWNERSHIP AND SUPERVISION—BECAUSE VOLUNTEERS DESERVE DIRECTION**

A volunteer program without clear ownership becomes a shared responsibility that quietly becomes nobody’s responsibility. Intentional programs name two things: who owns the system (design, consistency, fixes) and who supervises the work (day-to-day direction, feedback, and scheduling). These may be the same person in a small district, and they are still two hats.

This step matters because supervision is not optional. Volunteers need feedback and clarity, and staff need a consistent approach, so volunteers don’t get mixed messages.

Do this

- Identify a Program Owner (accountable for the whole program)
- Identify Role Supervisors (day-to-day direction for specific roles)
- Define who can approve role changes, exceptions, and removals
- Confirm staff capacity to supervise (time is a real resource)

Example (Program-level: Library District)

- Program Owner: Administrative Services Manager or Library Director (sets standards, approves roles, ensures consistency)
- Role Supervisors: Circulation Supervisor (front desk roles), Youth Services Coordinator (program support roles), Facilities Lead (event setup support roles)

Example (Role-specific: Customer Service Volunteer)

- Role Supervisor: Circulation Supervisor
- Escalation back-up: Library Director or designated lead when supervisor is unavailable

#### STEP 4: DEFINE THE LIFECYCLE SO YOUR PROGRAM RUNS ON PROCESS—NOT PERSONALITY

A lifecycle keeps your program consistent from recruiting through exit. Without it, districts often treat volunteers informally (“they seem nice, let’s plug them in”), and that’s when confusion, uneven treatment, and missed safety steps show up. A lifecycle also protects the volunteer experience: people like to know what to expect, what training they’ll receive, and how they’ll be supported.

The lifecycle does not need to be complex. It needs to be repeatable and clear.

Do this

- Document your stages:
  1. Recruit
  2. Screen/select
  3. Onboard
  4. Train
  5. Support/retain
  6. Address performance issues
  7. Exit/transition
- Create a checklist for each stage (start simple, refine over time)

Example (Program-level: Library District lifecycle cues)

- Recruiting emphasizes community service + minimum availability expectations
- Screening matches role risk (lighter for shelving; stronger for customer service)
- Onboarding covers: mission, boundaries, confidentiality, safety basics
- Training is role-based and documented
- Support includes check-ins and recognition
- Exit includes return of access items + feedback + documentation closure

Example (Role-specific: Customer Service Volunteer lifecycle details)

- Screening focus: communication style, calm under pressure, comfort with boundaries
- Training focus: scripts/FAQs, escalation triggers, de-escalation basics, phone/email etiquette, logging
- Support: early check-in after first 2–3 shifts; periodic refreshers

## STEP 5: SET EXPECTATIONS THAT PROTECT SERVICE DELIVERY AND CULTURE

Volunteers are not employees, and they still represent the district and interact with the public. Clear expectations prevent misunderstandings and reduce the “I didn’t know” moments. This is also where you protect staff time: when volunteers know what “good” looks like and how to communicate, supervision becomes more efficient and the volunteer experience improves.

Expectations should be plain language, visible, and reinforced during onboarding.

Do this

- Define expectations for:
  - Conduct and professionalism (respect, boundaries, confidentiality)
  - Reliability (attendance, call-out, no-show response)
  - Communication norms (who to contact, how to escalate, where updates live)
  - Public-facing representation (accuracy, neutrality, no unofficial commitments)

#### Example (Program-level: Library District)

- “Our volunteers help create a welcoming, safe environment. We treat patrons and each other with respect, we follow procedures, and we ask for help when something falls outside our scope.”

#### Example (Role-specific: Customer Service Volunteer)

- “Answer general questions using approved resources. If the question becomes a complaint, conflict, policy interpretation, or safety issue—pause and hand off.”

### STEP 6: CREATE A RIGHT-SIZED PAPER TRAIL THAT SUPPORTS CONSISTENCY AND CONTINUITY

Documentation isn’t about bureaucracy—it’s about running a program you can explain, repeat, and improve. The right documents create continuity when staff changes, help volunteers feel supported, and provide a record of training and expectations when something goes sideways.

Your forms should scale to the role. Low-risk roles need fewer forms; public-facing and access-heavy roles need more structure.

#### Do this

- Build a core packet:
  - Volunteer application/profile
  - Role description
  - Acknowledgment/agreement (expectations + boundaries)
  - Training checklist + sign-offs
  - Incident/concern reporting method
- Add as needed:
  - Confidentiality agreement
  - Media release
  - Key/badge/access checkout and return
  - Inquiry log (for customer service roles)

Example (Program-level: Library District packet)

- One consistent packet format used across all roles, with “role add-ons” based on risk.

Example (Role-specific: Customer Service Volunteer add-ons)

- Confidentiality agreement
- Inquiry log template (date/topic/action/handoff)
- Approved response templates (email and voicemail)

## STEP 7: BUILD GUARDRAILS BY ROLE RISK—STRUCTURE SHOULD MATCH EXPOSURE

Not every volunteer role carries the same risk. A shelving volunteer and a customer service desk volunteer are both valuable, and they should not be managed the same way. “Risk tiering” helps you scale screening, training, supervision, and documentation to the role—without treating every volunteer like a high-risk assignment.

When you do this well, you protect volunteers (clear limits), staff (fewer surprises), and the public (consistent service and safe interactions).

Do this

- Create role tiers (Low / Medium / High) using factors like:
  - Public interaction intensity
  - Access to money, keys, systems, or sensitive info
  - Safety exposure (equipment, fieldwork, driving)
  - Work with minors or vulnerable populations
- Tie each tier to minimum requirements for screening, training, supervision, and documentation.

Example (Program-level: Library District tiering)

- Low: shelving/materials support (task-focused, limited access)
- Medium: customer service desk support (public-facing + systems/email)
- Higher: technology helper or youth program support (skill + vulnerability exposure)

### Example (Role-specific: Customer Service Volunteer guardrails)

- Tier: Medium
- Requirements: structured screening, documented training, clear scripts/FAQs, inquiry log, defined escalation, closer supervision early on.

## RISK FACTORS EVERY DISTRICT SHOULD CONSIDER

Risk management in a volunteer program is not about assuming the worst in people—it’s about designing for reality. Volunteers are often generous, capable, and committed, and they are also not employees, may have inconsistent availability, and may be placed into public-facing or safety-adjacent situations. A strong program names the predictable risk zones up front, builds guardrails into roles and processes, and then trains and supervises to those guardrails.

This section is organized as practical risk categories you can assess role-by-role. The goal is consistency: every district should be able to say, “We considered the common exposures, we matched controls to the role, and we can explain our approach.” We will continue to use the Library District examples for program-level decisions, and the Customer Service Desk volunteer for role-specific controls.

Volunteer program risks rarely show up in a single neat lane. Most exposures fall into several overlapping categories—how the program is designed and supervised, how volunteers interact with the public and each other, safety and emergency realities, information and records, assets and money, off-site activities and transportation, and the unique workforce dynamics that special districts manage. The next section breaks these categories down and walks through the common risk areas in each one, highlighting what districts should think about from an operational standpoint, what legal/compliance considerations may be triggered (not legal advice), and what to confirm with your insurance carrier or risk pool.

Let’s explore the categories.

## PROGRAM STRUCTURE, BOUNDARIES, AND SUPERVISION

Program Structure, Boundaries, and Supervision is the “foundation bucket” because it shapes how every other risk shows up—or doesn’t. When a district has clear program design, defined roles, and a real supervision chain, volunteers know what success looks like, staff know what they can rely on, and the public gets consistent service. When those elements are vague, the program runs on goodwill and improvisation, and that is where preventable problems grow: roles expand beyond intent, volunteers fill gaps they were

never trained to fill, different staff members give different directions, and no one is quite sure who has authority to intervene when something feels off.

This bucket is also where districts often underestimate the workload. Volunteer coordination is not simply scheduling—it includes screening for fit, onboarding, training, coaching, responding to issues, and maintaining documentation that keeps the program consistent through staff turnover and leadership changes. Boundaries are especially important in special districts because the work can be close to mission-critical services and public trust. “Boundaries” doesn’t mean distrust; it means clarity: what volunteers are authorized to do, what they are not authorized to do, what to do when a situation escalates, and who owns the handoff. Strong boundaries protect volunteers from being placed in unfair or unsafe situations, and they protect staff from having to repair outcomes created by well-intentioned overreach.

Finally, supervision is the practical expression of duty of care. Volunteers deserve access to guidance and support, and districts need a consistent way to spot issues early and correct course quickly. That requires naming responsibility—who designs the program, who supervises each role day-to-day, who approves exceptions, and how concerns are reported and acted on. Many districts can prevent a significant percentage of volunteer-related incidents simply by strengthening this bucket, because it converts “help” into a predictable system that can be explained, repeated, and improved.

---

## 1) ROLE SCOPE CREEP AND BLURRED BOUNDARIES

Roles expand informally (“just this once...”) until volunteers are doing higher-risk work without the screening, training, or supervision to match it.

- Operational risks: inconsistent service; errors; conflict with staff; volunteers operating beyond competence; “exceptions become the norm.”
- Legal/compliance considerations (not advice): liability questions increase when tasks exceed defined role scope; unclear authorization complicates the district’s ability to defend decisions; documentation becomes important if disputes arise.
- Insurance/risk partner considerations: carriers often look for role clarity, supervision, and training documentation; unclear role scope can create coverage questions or increased scrutiny after an incident.

---

## 2) WORKING ALONE AND SUPERVISION GAPS

Volunteers placed without accessible supervision may face situations they can't safely manage (public conflict, safety issues, sensitive questions).

- Operational risks: delayed response; unsafe interactions; volunteers improvising; inconsistent escalation; higher incident likelihood.
- Legal/compliance considerations (not advice): duty-of-care concerns rise when volunteers are placed in situations without appropriate oversight; expectations must be realistic and communicated.
- Insurance/risk partner considerations: risk pools commonly care about supervision standards for public-facing or higher-exposure roles; they may recommend “never alone” rules in certain settings.

---

### 3) SCREENING AND SELECTION CONSISTENCY (FIT FOR ROLE)

The screening level should match the exposure of the role; inconsistent selection creates preventable mismatches.

- Operational risks: high turnover; performance issues; increased supervision burden; conflict; service errors.
- Legal/compliance considerations (not advice): inconsistent screening practices can create fairness and perception issues; for some roles (youth/vulnerable populations, driving, financial access), heightened diligence may be expected.
- Insurance/risk partner considerations: some insurers recommend or require certain screening for specific exposures (e.g., driving/MVR checks, youth programs).

---

### 4) TRAINING GAPS AND INCONSISTENT INSTRUCTIONS

“Shadowing only” and mixed messages lead to volunteers inventing practices and staff correcting on the fly.

- Operational risks: inconsistent service; avoidable errors; poor volunteer experience; escalation delays.
- Legal/compliance considerations (not advice): training records can matter when the district must explain what it expected and why; inconsistent guidance can weaken defensibility.

- Insurance/risk partner considerations: training expectations are a common carrier focus; they may ask whether training is documented and refreshed for higher-exposure roles.

---

## 5) VOLUNTEER MISCONDUCT, PERFORMANCE ISSUES, AND REMOVAL

Without a clear response process, districts tolerate problems too long—and then struggle to act consistently.

- Operational risks: harm to culture; staff frustration; public complaints; volunteer conflict; reputational damage.
- Legal/compliance considerations (not advice): fairness and consistency still matter (even with volunteers); documentation and a clear process help reduce claims of arbitrary treatment.
- Insurance/risk partner considerations: carriers may want a clear reporting/escalation pathway for conduct and safety concerns; early intervention reduces severity.

## PUBLIC INTERFACE AND COMMUNITY TRUST

Public Interface and Community Trust matters because volunteers are often the most visible face of the district—and the public rarely distinguishes between “volunteer” and “staff” in the moment. When a volunteer answers a question at a front counter, responds to an email, helps at an event, or interacts with someone who is frustrated, that interaction becomes part of the community’s lived experience of the district. Most of the time, that’s a huge benefit: volunteers can create warmth, accessibility, and extra capacity that makes the organization feel responsive and human. And because special districts are public entities, the expectations for fairness, consistency, and professionalism are high, even in everyday interactions.

This bucket also carries “small moment, big consequence” risk. A single public-facing misstep—an inaccurate statement, an unintended promise, a poorly handled conflict, a dismissive comment, or a volunteer stepping into a role they shouldn’t—can quickly become a complaint, a board issue, a social media story, or a formal request for information. The risk isn’t only reputational; it’s operational. Staff time gets pulled into cleanup, trust erodes, and the district may need to revisit processes under pressure rather than by design. That’s why public-facing volunteer roles benefit from clear scripts, “no promises/no policy interpretation” boundaries, and fast handoff expectations, so volunteers can be helpful without being placed in an unfair position.

Finally, community trust is strengthened by predictability. People want to know whether they call on Monday or walk in on Thursday, they'll get respectful treatment and consistent information. That consistency doesn't come from asking volunteers to be experts; it comes from designing roles that are appropriate for volunteers, providing training that matches the role exposure, and setting clear escalation points. In other words, the district earns trust not by requiring perfection from volunteers, and by building a system where volunteers can reliably support the public and staff can quickly step in when the situation requires authority, judgment, or specialized knowledge.

---

## 1) PUBLIC-FACING INTERACTIONS AND CONFLICT ESCALATION

Most interactions are easy; the small percentage that aren't, can become safety and complaint events quickly.

- Operational risks: escalation, safety incidents, service disruption, staff time drain, negative patron/community experience.
- Legal/compliance considerations (not advice): potential liability if interactions become discriminatory, retaliatory, or unsafe; boundary issues if volunteers attempt enforcement or adjudication.
- Insurance/risk partner considerations: insurers often emphasize de-escalation expectations, supervision availability, and incident reporting.

---

## 2) MISINFORMATION AND “UNOFFICIAL COMMITMENTS”

Volunteers can inadvertently interpret policy, promise outcomes, or provide guidance that the public relies on.

- Operational risks: rework, complaints, inequitable outcomes, confusion, damaged trust.
- Legal/compliance considerations (not advice): misstatements can create reliance and dispute risk; “who is authorized to speak for the district” matters.
- Insurance/risk partner considerations: carriers may flag “professional advice” or communications-related exposures; they often prefer scripts, templates, and clear referral rules.

---

## 3) REPUTATION AND PUBLIC TRUST

One incident can overshadow months of good service, especially when the volunteer is seen as acting for the district.

- Operational risks: community confidence drops; board/staff time shifts to damage control; recruiting becomes harder.
- Legal/compliance considerations (not advice): public entities have heightened scrutiny; documentation and consistency help when responding to public complaints.
- Insurance/risk partner considerations: carriers may provide crisis response guidance, incident reporting expectations, and recommended standards for public-facing roles.

## PEOPLE, CONDUCT, AND RESPECTFUL WORKPLACE

People, Conduct, and Respectful Workplace is the bucket that protects the human experience of the program—volunteers, employees, and members of the public. Volunteers enter your organization with goodwill, and they still bring different communication styles, life experiences, boundaries, and expectations about what’s “normal.” Staff do too. Add in public interaction, busy days, stress, and misunderstandings, and you have the ingredients for conflict unless the district intentionally sets standards for behavior and has a clear, trusted way to respond when something goes sideways.

This bucket often surprises districts because the risk is not only “a volunteer causes a problem.” Sometimes the volunteer is the one harmed—by a member of the public, by another volunteer, or even by an employee who forgets that volunteers deserve the same basic respect and psychological safety as anyone else in the workplace. That means districts need conduct expectations that apply in all directions, and they need reporting channels that volunteers feel safe using. When the culture is unclear, people tend to minimize issues until they become big issues, and then the district is forced into urgent decisions that could have been managed earlier with simple coaching, redirection, or role adjustment.

This bucket also includes heightened duty-of-care roles—especially those involving minors or vulnerable populations. In these settings, the expectations for boundaries, supervision, and appropriate interaction are higher, and “good intent” is not enough protection. Programs that serve youth or vulnerable individuals benefit from stronger screening practices, clearly defined “never alone” rules when appropriate, and training that focuses on boundaries and escalation. In short, a respectful workplace framework is not a nicety—

it's risk management, retention strategy, and public trust protection all at once, and it keeps the volunteer experience aligned with the district's values and responsibilities.

---

## 1) HARASSMENT, DISCRIMINATION, AND RESPECTFUL WORKPLACE CONDUCT

Volunteers interact with employees, other volunteers, and the public; misconduct can come from any direction.

- Operational risks: turnover, conflict, unsafe environment, loss of volunteers, employee morale issues.
- Legal/compliance considerations (not advice): anti-harassment and non-discrimination expectations can apply to the environment the district maintains; response processes matter.
- Insurance/risk partner considerations: carriers often want clear reporting channels and prompt response; they may provide model policies or training recommendations.

---

## 2) SERVING MINORS OR VULNERABLE POPULATIONS

Roles involving youth or vulnerable individuals raise duty-of-care expectations and often require enhanced safeguards.

- Operational risks: supervision complexity; boundary issues; heightened incident sensitivity; reputational risk.
- Legal/compliance considerations (not advice): stricter standards may apply depending on program type; background screening practices may be expected; clear “never alone” rules are common.
- Insurance/risk partner considerations: carriers frequently have specific requirements or strong recommendations for screening, supervision, and reporting in these roles.

## SAFETY, INCIDENTS, AND EMERGENCIES

Safety, Incidents, and Emergencies is the bucket that reminds districts that “low-risk” does not mean “no-risk.” Even in roles that look simple—greeting the public, shelving supplies, helping set up an event—people can slip, trip, strain a muscle lifting a box, encounter an agitated community member, or be present during a medical event or building emergency. Special districts also operate in a wide range of environments, from offices and libraries to shops, field sites, and stations, and each setting carries its own

predictable hazards. The point of this bucket is not to make districts fearful; it's to make safety expectations normal, clear, and repeatable.

This bucket also covers what happens after something occurs. Many programs stumble not because an incident happened, and because the district didn't have a consistent response: volunteers weren't sure who to tell, staff weren't sure what to document and reporting to risk partners happened late or inconsistently. A strong volunteer program sets basic safety orientation for everyone (what to do, who to contact, when to stop work), and then adds role-based safety training where exposure increases. It also reinforces a core principle: volunteers should never be expected to "handle" emergencies alone. Their job is typically to notice, protect themselves and others, and escalate to staff or emergency responders—quickly.

Finally, emergencies and incidents are where clarity about authority matters most. Volunteers need permission to step back, stop work, and get help without worrying they're "letting the district down." Staff need a defined chain for decision-making and communication, and leaders need confidence that the program design supports safe behavior in the moment. When safety expectations are built into onboarding, reinforced through supervision, and supported by straightforward incident reporting, districts reduce both the likelihood of harm and the severity of outcomes when the unexpected happens.

---

## 1) SAFETY AND PHYSICAL ENVIRONMENT

Slips, trips, lifting, disruptive individuals, and emergencies can occur in "normal" volunteer work.

- Operational risks: injuries, claims, service disruption, staff time, volunteer attrition.
- Legal/compliance considerations (not advice): duty-of-care and reasonable safety practices; incident documentation and response consistency matter.
- Insurance/risk partner considerations: carriers often have incident reporting timelines and preferred forms/processes; they may recommend safety orientations and role-based training.

---

## 2) MEDICAL/FIRST AID RESPONSE AND EMERGENCIES

Volunteers may be present during medical events or emergencies and need clear boundaries and response steps.

- Operational risks: delayed response, inappropriate intervention, panic/uncertainty, safety escalation.

- Legal/compliance considerations (not advice): clarity on what volunteers are authorized to do; avoid assigning responsibilities that require certification unless the volunteer role is specifically designed that way.
- Insurance/risk partner considerations: confirm expectations for emergency response training, reporting, and whether certain roles require specific certifications.

---

### 3) INJURIES TO VOLUNTEERS (AND REPORTING EXPECTATIONS)

When a volunteer is injured, the district must respond consistently and document appropriately.

- Operational risks: inconsistent treatment, delayed reporting, confusion about coverage, reputational impact with volunteer community.
- Legal/compliance considerations (not advice): reporting requirements and benefit questions can vary based on district practices and coverage; consistency is key.
- Insurance/risk partner considerations: clarify volunteer injury coverage, reporting deadlines, and what documentation is needed.

### INFORMATION, RECORDS, AND TECHNOLOGY

Information, Records, and Technology is the bucket that districts often underestimate because the risks can feel invisible—until they aren't. Volunteers may handle email, answer phones, use shared documents, access a shared inbox, log interactions, or simply overhear and observe information in the course of being helpful. In a special district environment, “small” bits of information can matter: a name tied to an address, a complaint shared casually, a draft note left in a shared folder, or an email response that unintentionally becomes the district’s “official answer.” Because public entities operate with transparency expectations, records retention requirements, and heightened community scrutiny, the way information is created, shared, stored, and retained becomes part of the risk landscape.

This bucket is also where informal practices create the biggest exposure. Shared passwords, volunteers using personal email accounts, texts on personal phones, screenshots, and “quick notes” in unapproved places are common convenience shortcuts that turn into security and records problems later. Even with excellent intent, those practices can lead to unauthorized access, accidental disclosure, inconsistent retention, and time-consuming retrieval issues when the district needs to respond to a complaint, a public records request, or an internal review. The safest systems are the boring ones:

defined communication channels, least-privilege access, and simple rules about what volunteers should never handle.

Finally, technology and records are not just IT issues—they are program design issues. The district decides what information volunteers need to do their roles, and everything else should be off-limits. Volunteers should be trained to recognize sensitive topics, to use approved templates and scripts, to avoid policy interpretation, and to escalate when something feels “beyond general information.” When districts treat information controls as part of onboarding and supervision—rather than an afterthought—they reduce the likelihood of privacy breaches, recordkeeping chaos, and cybersecurity incidents, and they strengthen public trust through consistent and professional communication.

---

### 1) CONFIDENTIALITY, PRIVACY, AND SENSITIVE INFORMATION EXPOSURE

Volunteers may see or overhear sensitive data and may not recognize what must be protected.

- Operational risks: accidental sharing, loss of trust, complaints, internal disruption.
- Legal/compliance considerations (not advice): privacy and confidentiality obligations can be triggered depending on the information and program; access should be limited to what’s necessary.
- Insurance/risk partner considerations: carriers may expect confidentiality practices and access controls; breaches can trigger claims and required notifications.

---

### 2) RECORDS AND PUBLIC COMMUNICATIONS (INCLUDING EMAIL/TEXT)

Volunteer communications may become district records; informal practices create retention and transparency challenges.

- Operational risks: inconsistent retention, missing records, confusion during public inquiries, staff time drain.
- Legal/compliance considerations (not advice): public sector record retention and disclosure expectations may apply; “if it exists, it may be producible.”
- Insurance/risk partner considerations: risk partners may recommend standard communication channels (shared inboxes, approved systems) and guidance for retention consistency.

---

### 3) SYSTEM ACCESS AND CYBERSECURITY

Shared passwords, unmanaged access, and informal device use create real data and security exposure.

- Operational risks: unauthorized access, data loss, phishing vulnerability, operational disruption.
- Legal/compliance considerations (not advice): data handling rules may apply depending on what systems/records are accessed; least-privilege access is a key principle.
- Insurance/risk partner considerations: cyber coverage and incident reporting expectations vary; insurers may expect basic controls (unique logins, access removal on exit, secure channels).

## ASSETS, MONEY, AND ACCESS

Assets, Money, and Access are in the bucket that combines real-world controls with public perception—because in special districts, it’s not only about whether something goes wrong, it’s also about whether your community can trust how you safeguard district resources. Volunteers may use tools, equipment, computers, keys, badges, and facilities, and in some programs they may be near donations, fees, or event-related revenue. Even when everyone is honest, mistakes happen: items get lost, equipment gets damaged, cash counts don’t match, and access is granted more broadly than necessary because it feels convenient. This bucket exists to make sure the district is deliberate about what volunteers can use, handle, and access—and how that access is controlled over time.

Money-related risk is especially sensitive because “appearance” matters. A small error in donation handling can become a much larger trust issue, and informal practices can create suspicion even when there’s no misconduct. The most reliable approach is clarity and separation: define what volunteers can do to support an event or process, and reserve high-trust functions—like accepting payments, reconciling funds, issuing receipts, and controlling deposits—for staff or tightly controlled procedures. In the same way, access to district property should follow the “just enough to do the role” principle: the more access someone has, the more responsibility the district has to ensure training, accountability, and timely removal of access when the volunteer exits.

Finally, this bucket is where program discipline prevents long-term headaches. Keys, badges, passwords, devices, and equipment need lifecycle thinking: who authorizes access, how it is tracked, how it is returned, and how you confirm access has been removed. Districts can avoid many preventable incidents by being consistent—no informal key copies, no shared logins, no “just borrow the laptop,” no untracked equipment, and no

“we’ll deal with it later” when a volunteer leaves. When access and asset practices are built into onboarding, supervision, and exit processes, volunteers can contribute confidently and districts can demonstrate good stewardship of public resources.

---

### 1) MONEY HANDLING AND FINANCIAL TRANSACTIONS (FEES, DONATIONS, FUNDRAISING)

Cash/check handling creates error and perception risk even when everyone is honest.

- Operational risks: mistakes, missing funds, disputes, staff time, reputational harm.
- Legal/compliance considerations (not advice): public funds and donation managing often have strict expectations; segregation of duties and documented processes are common safeguards.
- Insurance/risk partner considerations: carriers may expect controls (dual counts, receipts, logging) or recommend keeping volunteers out of direct handling.

---

### 2) USE OF DISTRICT PROPERTY, TOOLS, EQUIPMENT, AND TECHNOLOGY

Access to equipment can create injury risk, damage risk, and accountability issues.

- Operational risks: misuse, breakage, inconsistent practices, unsafe operation.
- Legal/compliance considerations (not advice): authorization and training expectations rise with equipment complexity; documentation can matter when incidents occur.
- Insurance/risk partner considerations: risk pools often have guidance on equipment use, safety training, and incident reporting.

---

### 3) KEYS, BADGES, FACILITIES ACCESS, AND “WHO CAN GO WHERE”

Physical access is a control point. Too much access creates security risk; too little can make roles unworkable.

- Operational risks: theft, safety issues, unauthorized entry, confusion during emergencies.
- Legal/compliance considerations (not advice): access should match role necessity; districts should be able to explain who had access and why.
- Insurance/risk partner considerations: carriers may recommend access logs, checkout/return practices, and strict removal of access when volunteers exit.

## OFF-SITE WORK AND TRANSPORTATION

Off-site Work and Transportation is the bucket where risk tends to increase quickly because the district's normal controls weaken the moment the work leaves the building. On-site, there are predictable routines: supervision is easier, the environment is more controlled, help is nearby, and equipment and information are easier to manage. Off-site work introduces variables—unfamiliar locations, changing conditions, reduced communication, and fewer immediate support options. Even when the tasks seem simple, the district has less ability to observe, intervene, and respond quickly if something changes.

Transportation deserves special emphasis because driving is one of the highest-severity exposures a volunteer can take on behalf of a district. A minor errand can turn into a major incident, and post-incident questions often focus on authorization: Was driving allowed? Was it assigned? Was it necessary? Was the volunteer trained or screened for that exposure? The same is true for transporting people or handling district property off-site—responsibility and boundaries must be explicit. Many districts decide that volunteer driving is prohibited unless there is a well-designed role and a structured authorization process, and that decision is often the most straightforward risk control they can make.

This bucket is also where insurance and risk partner alignment matters early, not after the fact. Coverage can vary based on whether the volunteer is using a personal vehicle or a district vehicle, whether the activity was approved, and what the volunteer was doing at the time. Off-site roles may also trigger higher expectations for screening, training, supervision, and incident reporting. The practical takeaway is simple: if a task requires off-site work or transportation, the district should treat it as a deliberate design choice—define the scope, limit the activity, build an escalation plan, and confirm expectations with risk partners before the role is launched.

---

### 1) DRIVING AND TRANSPORTATION (DISTRICT OR PERSONAL VEHICLES)

Driving for district purposes increases severity exposure quickly (injury/property damage/claims).

- Operational risks: accidents, unclear authorization, inconsistent task limits, delayed incident response.
- Legal/compliance considerations (not advice): scope/authorization questions often become central after incidents; transporting people raises heightened duty-of-care issues.

- Insurance/risk partner considerations: confirm volunteer driving coverage, whether personal auto is primary, whether MVR checks are expected, and what authorizations/limits the carrier recommends.

---

## 2) OFF-SITE ACTIVITIES AND FIELD WORK

Field conditions and reduced supervision increase safety and liability risk.

- Operational risks: unpredictable hazards, communication gaps, delayed emergency response, inconsistent practices.
- Legal/compliance considerations (not advice): duty-of-care expectations increase; clear authorization, training, and boundaries matter more off-site.
- Insurance/risk partner considerations: confirm coverage and reporting expectations for off-site work; carriers may require specific training or prohibit certain activities for volunteers.

### WORKFORCE/LABOR AND VOLUNTEER STATUS

Workforce/Labor and Volunteer Status is the bucket that reflects the unique reality of special districts: volunteers do not operate in a vacuum—they operate alongside employees, within public-sector accountability, and sometimes within bargaining relationships. Districts often think of this bucket only when a conflict emerges (“the union is upset” or “this feels like employee work”), and it’s far easier to address upfront through program design than to unwind later under pressure. The core question is not whether volunteers are valuable—they are—it’s whether volunteer roles are clearly defined so they support the mission without unintentionally stepping into employee-replacement territory or creating avoidable labor friction.

This bucket also covers the “volunteer vs. employee-like” boundary. The more a district manages volunteers like employees—required schedules that resemble staffing, compensation-like perks, performance expectations that mirror employment, and high control over how and when work is performed—the more the district should pause and evaluate whether the arrangement creates classification and compliance questions. The point is not that volunteers can’t be accountable; they can and should be. The point is that accountability should be tied to the volunteer agreement and role expectations, and not drift into employment-like structures that create confusion for the district, the volunteer, and anyone evaluating the relationship later.

Finally, workforce dynamics show up in practical ways: who supervises volunteer work, how staff interact with volunteers, how volunteers are introduced to bargaining unit

environments, and how the district handles disputes or performance issues. When roles and boundaries are designed intentionally, districts can avoid many “status” problems and most labor tensions—because they can clearly explain what volunteers do, why it is appropriate for volunteers, and how the district ensures the work remains supplemental rather than substitutive. In short, this bucket protects both sides of the house: it helps volunteers contribute meaningfully, and it helps the district maintain stable employee relations and defensible program practices.

---

## 1) VOLUNTEER STATUS AND “EMPLOYEE-LIKE” EXPECTATIONS

If volunteers are managed like employees (high control, compensation-like practices, required hours, discipline frameworks that mirror employment), classification and compliance questions increase.

- Operational risks: blurred expectations, morale issues, volunteer dissatisfaction, inconsistent management.
- Legal/compliance considerations (not advice): volunteer vs. employee distinctions can be fact-specific; compensation-like arrangements and required schedules can complicate status.
- Insurance/risk partner considerations: coverage and benefit structures can differ for volunteers vs employees; clarify how volunteer injuries and activities are covered.

---

## 2) UNION/EMPLOYEE RELATIONS AND DISPLACEMENT CONCERNS

Volunteers doing work perceived as bargaining unit work can trigger grievances and labor conflict.

- Operational risks: employee morale issues, conflict, delays, leadership distraction.
- Legal/compliance considerations (not advice): bargaining agreements and past practice matter; using volunteers in core operational roles can raise representation concerns.
- Insurance/risk partner considerations: carriers won’t solve labor issues, but they will care about the operational fallout and claims risk that can emerge from conflict and inconsistent practices.

The best place to prevent most volunteer-program risk is program design: clear role definitions, realistic boundaries, role-based screening and training, and a named chain of

responsibility for supervision and escalation. When those elements are strong, many risks never fully form.

And sometimes the risk cannot be designed away—because the service still must be delivered. In those cases, the “solution” is not more hope; it’s explicit assignment of responsibility: clearly stating who is authorized to do what, what training is required, when to stop, and who takes over. That clarity protects the volunteer, the staff, and the district.

The risk areas above apply to every special district because they show up in nearly every volunteer program, regardless of mission: boundaries drift, public interactions get complicated, safety incidents happen, information gets shared, and access can outpace oversight. And then there’s the second layer—risks that are shaped by *what your district does*. A library district’s volunteer exposures look different from a fire district’s, and a soil and water conservation district will face different off-site and technical activity considerations than a parks or water district.

Oregon’s Blue Book summarizes the district types authorized in statute (ORS 198.010 and 198.335) as 28 types, including: water control, irrigation, ports, regional air quality control, fire, hospital, mass transit, sanitary districts/authorities, people’s utility, domestic water supply districts/authorities, cemetery, park & recreation, metropolitan service, special road, road assessment, highway lighting, health, vector control, water improvement, weather modification, geothermal heating, transportation, county service, chemical control, weed control, emergency communications, diking, and soil & water conservation districts. The next section shifts from the universal risk areas to the district-type-specific risks that show up because of your mission and operating environment. You’ll keep the foundational safeguards in place, and you’ll layer in the additional considerations that tend to apply to certain district types—based on the services you provide, the settings where volunteers work, and the expectations your community brings to the table.

Risk Area + Why it matters	Considerations
<p><b>Air quality regulatory sensitivity</b></p> <p><u>Why it matters:</u> In districts with a regulatory or quasi-regulatory posture, volunteer statements or actions can be mistaken for official determinations or enforcement. That confusion can trigger complaints and undermine credibility fast.</p> <p><u>Applies most to:</u> Regional Air Quality Control Authorities</p>	<p>Operational risks • Inconsistent messaging and “off-script” explanations • Volunteers drifting into enforcement-like behaviors • Public confusion about authority and next steps</p> <p>Legal/compliance considerations (not advice) • Clarity on who is authorized to make determinations and speak for the district matters • Volunteers should not issue directives or represent enforcement authority</p> <p>Insurance/risk partner considerations • Ask for recommended messaging controls/scripts and complaint-handling protocols • Confirm incident reporting expectations for regulatory-related disputes</p>

<p style="text-align: center;"><b>Risk Area + Why it matters</b></p>	<p style="text-align: center;"><b>Considerations</b></p>
<p><b>Aquatics and pool operations (drowning risk, supervision intensity, water chemistry)</b></p> <p><u>Why it matters:</u> Aquatic environments are high-severity settings where a supervision lapse or unclear authority can become catastrophic quickly. Volunteer roles should be limited to support tasks unless the district has certification, supervision, and emergency response structure designed for aquatics.</p> <p><u>Applies most to:</u> Park &amp; Recreation (primary), Metro/County service districts with aquatic facilities</p>	<p>Operational risks • Supervision gaps and delayed emergency response • Confusion during incidents (“who is in charge right now”) • Volunteers drifting into lifeguard/instructor functions</p> <p>Legal/compliance considerations (not advice) • Aquatics often carries heightened duty-of-care expectations; certain roles may require certification/defined authority • Chemical/pump-room access should be strictly controlled</p> <p>Insurance/risk partner considerations • Carriers often have specific aquatics expectations (certifications, staffing ratios, emergency action plans, reporting timelines) • Confirm which volunteer tasks are permitted and required training</p>
<p><b>Aquatic and waterway field hazards (canals, ditches, flood-control areas)</b></p> <p><u>Why it matters:</u> Work near water infrastructure introduces drowning risk, unstable banks, hidden hazards, and remote response challenges. Risk increases sharply when volunteers are close to moving water or structures.</p> <p><u>Applies most to:</u> Water Control, Irrigation, Diking, some Water Improvement and Soil &amp; Water field projects</p>	<p>Operational risks • Slips/falls into water; difficult rescue conditions • Remote communication gaps and delayed response • Volunteers working too close to hazards without safeguards</p> <p>Legal/compliance considerations (not advice) • Duty-of-care expectations increase in remote/field environments • Conservative role design and clear boundaries are essential</p> <p>Insurance/risk partner considerations • Confirm coverage for field activities and required training/PPE • Ask whether any water-adjacent tasks are excluded for volunteers</p>
<p><b>Confined space exposure (vaults, pits, tanks, lift stations)</b></p> <p><u>Why it matters:</u> Confined spaces carry severe hazards and typically require specialized procedures, equipment, and rescue readiness. Volunteer involvement is usually limited to non-entry support roles—if permitted at all.</p> <p><u>Applies most to:</u> Sanitary/Sewer, Water districts/authorities, some PUD operations</p>	<p>Operational risks • High-severity injury/fatality exposure • Rescue complications and delayed response • Boundary failure (“I’ll just step in for a second”)</p> <p>Legal/compliance considerations (not advice) • Confined space requirements can be stringent; entry authorization/training expectations are high • Role design should be conservative and explicit</p> <p>Insurance/risk partner considerations • Many risk pools have strong guidance or prohibitions for non-employee entry • Confirm coverage expectations and controls before permitting any volunteer role near confined spaces</p>

<p style="text-align: center;"><b>Risk Area + Why it matters</b></p>	<p style="text-align: center;"><b>Considerations</b></p>
<p><b>Electrical hazards and energized equipment proximity</b></p> <p><u>Why it matters:</u> Electric utility environments are high-severity; mistakes can be catastrophic. Volunteer roles near energized equipment must be extremely conservative and clearly separated from operational work.</p> <p><u>Applies most to:</u> People’s Utility Districts (electric), some Metro/County operations with electrical infrastructure</p>	<p>Operational risks • Severe injury/fatality and emergency response complexity • Volunteers entering restricted operational zones • Equipment damage and service disruption</p> <p>Legal/compliance considerations (not advice) • Specialized safety/authorization standards may apply in energized environments • Avoid assigning tasks that require qualifications or violate safety controls</p> <p>Insurance/risk partner considerations • Confirm whether volunteers are permitted in certain areas at all • Ask what training/site controls are required and any exclusions for operations-adjacent roles</p>
<p><b>Emergency response and incident-scene operations</b></p> <p><u>Why it matters:</u> Response scenes are dynamic, high hazard, and command-driven. Volunteer role confusion or improvisation can create serious harm quickly.</p> <p><u>Applies most to:</u> Fire &amp; Rescue (primary), sometimes Emergency Communications (support), some Transit/Transportation incident support</p>	<p>Operational risks • Scene accountability breakdown and unsafe actions • Interference with incident command • Responder injury and public safety failures</p> <p>Legal/compliance considerations (not advice) • Clear authorization, scope-of-practice, and documentation expectations matter after incidents • Volunteers should not act beyond their assigned function</p> <p>Insurance/risk partner considerations • Confirm training standards/competencies and reporting expectations • Clarify whether response roles trigger different coverage requirements than support-only volunteer roles</p>
<p><b>EMS/medical scope-of-practice and patient care boundaries</b></p> <p><u>Why it matters:</u> Patient-adjacent work has higher expectations for authorization, documentation, and boundaries. “Helping” can drift into care decisions unless roles are designed very clearly.</p> <p><u>Applies most to:</u> Fire &amp; Rescue (EMS), Hospital districts, Health districts</p>	<p>Operational risks • Improper patient assistance and documentation errors • Privacy issues during incidents • Delayed escalation to qualified staff</p> <p>Legal/compliance considerations (not advice) • Medical roles can be regulated and fact-specific; authorization and training must match the function • Privacy expectations rise with patient-related information</p> <p>Insurance/risk partner considerations • Confirm required certifications/training for any patient-adjacent roles • Clarify coverage for patient-related claims and incident reporting timelines</p>

<b>Risk Area + Why it matters</b>	<b>Considerations</b>
<p><b>Hazardous materials and industrial exposure control</b></p> <p><u>Why it matters:</u> Some districts operate around fuels, contaminated materials, industrial hazards, or restricted operational zones. Volunteer roles must avoid drifting into regulated or high-hazard tasks.</p> <p><u>Applies most to:</u> Ports, Fire &amp; Rescue (some contexts), some PUD and Water/Sanitary facilities</p>	<p>Operational risks • Exposure incidents and PPE failures • Property damage and emergency response needs • Volunteers entering restricted zones without controls</p> <p>Legal/compliance considerations (not advice) • Hazardous operations often have heightened authorization/training expectations • Clear boundaries and supervision are essential</p> <p>Insurance/risk partner considerations • Confirm whether volunteers are allowed in specific zones and what training/PPE is required • Ask about exclusions related to hazardous operations or environmental claims</p>
<p><b>Heavy equipment and powered equipment operations</b></p> <p><u>Why it matters:</u> Powered equipment increases injury severity and typically requires higher training and authorization expectations. Many districts can safely use volunteers around projects—and the actual operation of equipment is where the district needs deliberate boundaries.</p> <p><u>Applies most to:</u> Soil &amp; Water, Weed/Chemical/Vector Control, Irrigation/Water Control/Diking, Park &amp; Recreation, Cemetery, Road/Special Road/Highway Lighting, Ports, some Water/Sanitary operational settings</p>	<p>Operational risks • Serious injury exposure and property damage • “Helpful improvisation” (using equipment without approval) • Inconsistent PPE and safety practices across supervisors</p> <p>Legal/compliance considerations (not advice) • Equipment operation may trigger heightened safety/authorization expectations • Training and authorization records can matter after incidents</p> <p>Insurance/risk partner considerations • Confirm whether volunteers may operate specific equipment and required training • Ask whether certain equipment use is excluded or requires stricter controls</p>
<p><b>Infection control and clinical environment boundaries</b></p> <p><u>Why it matters:</u> Health settings can involve exposure to infectious diseases and require strict protocols. Even “support” roles may need training and clear exclusion zones to protect volunteers and patients.</p> <p><u>Applies most to:</u> Hospital districts, Health districts</p>	<p>Operational risks • Exposure incidents and protocol violations • Volunteers entering patient-care areas without authorization • Disruption to clinical operations</p> <p>Legal/compliance considerations (not advice) • Privacy and infection control expectations can be stringent and role-specific • Role scope must be explicit and conservative</p> <p>Insurance/risk partner considerations • Confirm required trainings/protocols for volunteers and incident reporting expectations • Clarify whether certain areas/tasks are excluded for volunteers</p>

<b>Risk Area + Why it matters</b>	<b>Considerations</b>
<p><b>Pesticide/herbicide application and pesticide-use restrictions</b></p> <p><u>Why it matters:</u> Chemical application raises injury, drift, and public complaint risk and often carries licensing/training expectations. Even “assisting” can create exposure if boundaries are unclear.</p> <p><u>Applies most to:</u> Vector Control, Weed Control, Chemical Control, some Soil &amp; Water projects</p>	<p>Operational risks • Misapplication and drift complaints • PPE failures and exposure incidents • Community conflict and service disruption</p> <p>Legal/compliance considerations (not advice) • Pesticide use may require qualifications and strict adherence to label/safety standards • Volunteer participation can be heavily constrained</p> <p>Insurance/risk partner considerations • Confirm whether volunteers may participate and required safeguards • Ask about exclusions related to chemical use/environmental claims</p>
<p><b>Security-restricted facilities and industrial waterfront environments</b></p> <p><u>Why it matters:</u> Restricted zones, contractors, and industrial operations increase safety and security expectations. Volunteer roles need clear limits on where they can go and what they can access.</p> <p><u>Applies most to:</u> Ports, some PUD, some Water/Sanitary facilities</p>	<p>Operational risks • Unauthorized entry and injuries in industrial areas • Contractor conflict and asset loss • Weak badge/escort practices</p> <p>Legal/compliance considerations (not advice) • Access authorization and documentation become central after incidents • Volunteers should not operate in restricted areas without explicit design</p> <p>Insurance/risk partner considerations • Ask about escort requirements, badging standards, and incident reporting expectations • Confirm any coverage limits for industrial zones</p>
<p><b>Structured youth programming operations (camps, leagues, classes)</b></p> <p><u>Why it matters:</u> Recurring youth programs have higher supervision intensity than general public presence. Sign-in/out, ratios, behavior management, and boundaries become operational necessities.</p> <p><u>Applies most to:</u> Park &amp; Recreation (primary), some Library programs, some Metro/County service community programs</p>	<p>Operational risks • Supervision lapses and inconsistent behavior management • Parent disputes and incident escalation • Boundary confusion during high-energy programs</p> <p>Legal/compliance considerations (not advice) • Youth programs may trigger heightened duty-of-care expectations • Screening, supervision standards, and reporting pathways often require greater rigor</p> <p>Insurance/risk partner considerations • Carriers frequently have youth-program requirements (background checks, ratios, training, reporting timelines) • Confirm requirements before expanding volunteer roles</p>

<b>Risk Area + Why it matters</b>	<b>Considerations</b>
<p><b>Volunteer nominal fee / allowable compensation in public safety settings</b></p> <p><u>Why it matters:</u> Fire/EMS volunteer programs sometimes use stipends or per call arrangements. The structure should remain aligned with allowable volunteer frameworks, so the program doesn't drift into employee-like compensation.</p> <p><u>Applies most to:</u> Fire districts / Fire &amp; Rescue</p>	<p>Operational risks • Inconsistent stipend rules and perceived unfairness • Shift expectations that resemble staffing models • Difficulty correcting course once practices are established</p> <p>Legal/compliance considerations (not advice) • Volunteer vs employee status can be fact-specific; payment structure and required schedules may affect analysis • Clarity and documentation of limits/intent matter</p> <p>Insurance/risk partner considerations • Confirm whether compensation affects coverage/benefits treatment • Ask what documentation and eligibility standards the risk pool expects</p>

## VOLUNTEER LIFECYCLE

The lifecycle has two tracks: Program Design & Stewardship, and Volunteer Engagement & Operations

A volunteer program doesn't stay healthy through onboarding alone. It stays healthy through two connected tracks: the work the district does to keep the program designed, current, and defensible, and the work the district does to bring individual volunteers in, support them, and transition them out well. When districts blend these together, "maintenance" often gets skipped until something breaks. When districts separate them, responsibilities become clearer, follow-through improves, and the program is easier to scale.

### TRACK 1: PROGRAM DESIGN & STEWARDSHIP

This track is the district's ongoing responsibility. It's where you maintain the structure that makes volunteer involvement safe, consistent, and sustainable—roles, boundaries, supervision expectations, training tools, and documentation. Program stewardship happens on a schedule (quarterly/annually), and it should also happen any time the district's services, environment, or risk tolerance changes.

Program Design & Stewardship cycle (repeat routinely)

- Confirm mission alignment and your role list (add/remove roles as district needs change)
- Review role risk tiers and guardrails (what has changed in exposure?)
- Refresh volunteer policies, scripts, templates, and forms
- Update training content and supervisor guidance
- Review incident/near-miss patterns and adjust guardrails
- Confirm insurance/risk partner expectations when roles or environments change
- Audit access controls and offboarding practices (keys, badges, system access, records)

## TRACK 2: VOLUNTEER ENGAGEMENT & OPERATIONS

This track is what most people picture as “the lifecycle.” It is the step-by-step experience an individual volunteer moves through—from first interest to exit—and it works best when the stewardship track is strong. Consistency here is what volunteers and staff feel every day: clear expectations, predictable training, timely feedback, and orderly transitions.

Volunteer Engagement & Operations lifecycle

1. Plan & Recruit
2. Screen & Select
3. Onboard
4. Train & Authorize
5. Support & Retain
6. Redirect / Pause / Remove
7. Exit & Offboard

How the two tracks work together

Program Design & Stewardship sets the standards—roles, boundaries, training, supervision, and tools. Volunteer Engagement & Operations applies those standards consistently with real people in real situations. When patterns show up in the day-to-day (confusion points, repeated questions, incidents, avoidable problems), the answer is often

not “try harder,” it’s “improve the system”—and that improvement lives back in Program Design & Stewardship.

With the foundation in place for Track 1: Program Design & Stewardship—your roles, boundaries, guardrails, and risk considerations—the next step is making the program run smoothly in real life. This is where Track 2: Volunteer Engagement & Operations comes in. The pages that follow break Track 2 into a practical, repeatable lifecycle—from first interest through exit—so you can manage volunteers consistently, scale your process based on role risk, and ensure every volunteer has the support and direction they need to contribute successfully.

---

## STAGE 1: PLAN & RECRUIT

Recruiting is where the district sets the tone for the entire volunteer experience. When you recruit to defined roles with clear expectations, you attract people who can succeed in those roles—and you reduce the likelihood of mismatches that later show up as performance issues, supervision strain, or preventable risk. This stage is not about filling openings quickly; it’s about building a dependable, role-based pipeline.

This stage also protects sustainability. Honest recruiting language about schedules, physical demands, public contact, and boundaries prevents “surprise exits” and helps volunteers self-select into the right opportunities. When recruiting is consistent and role-specific, it supports equity and fairness: everyone receives the same message about what the role is, what it requires, and how success is measured.

### Primary owner(s)

- Program Owner: approves roles and recruiting approach, confirms capacity to supervise
- Role Supervisor: validates the day-to-day tasks and schedule realities
- Admin support (if available): posting, scheduling interviews, tracking applications

### Minimum steps (must do)

- Recruit to an approved role description (no role, no recruiting)
- State time commitment and schedule expectations clearly
- Name the location/conditions (public-facing, outdoors, evenings, lifting, etc.)

- Include boundaries at a high level (“general info only,” “staff handle complaints,” etc.)
- Explain the steps: application → interview → onboarding/training → start

Good / Better / Best (scale by role risk)

- Good (low-risk): simple posting + clear availability needs + quick info session
- Better (medium-risk): role preview + example scenarios (“what you’ll do when...”)
- Best (higher exposure): pre-screen questions + written “authorized/not authorized” summary shared before interview

Common mistakes

- Recruiting “warm bodies” without a defined role
- Overselling the role and underselling the expectations
- Not being clear about availability requirements
- Bringing someone in before supervision capacity exists

Example: Role-specific (Customer Service Desk Volunteer)

Posting includes: minimum weekly shift, comfort with phone/email, ability to follow scripts/FAQs, and “handoff early to staff” expectation.

---

## STAGE 2: SCREEN & SELECT

Screening is the district’s opportunity to match the right person to the right exposure level. A well-designed volunteer program recognizes that not all roles carry the same risk, public visibility, or complexity. This stage helps prevent the common problem of “great volunteer, wrong role,” which is frustrating for everyone and can create avoidable incidents or service inconsistencies.

This stage also supports credibility and trust. Consistent screening practices—scaled to the role—help the district make decisions that are defensible, repeatable, and fair. It also allows you to confirm the practical realities early (availability, communication style, ability to follow boundaries), rather than discovering those issues after the volunteer is already public-facing or integrated into operations.

Primary owner(s)

- Role Supervisor: leads interview and selection for the role
- Program Owner: sets screening standards by role tier and approves exceptions
- Admin support: coordinates scheduling and reference collection (if used)

#### Minimum steps (must do)

- Use screening that matches role risk:
  - Low-risk: application + short conversation
  - Medium-risk: structured interview + references
  - Higher exposure: enhanced screening aligned with role needs and risk partner expectations
- Confirm availability and reliability expectations
- Confirm communication style and ability to follow boundaries
- Make a clear decision and document the basics (selected/not selected and why, briefly)

#### Good / Better / Best

- Good: consistent questions used for all candidates in the same role
- Better: structured interview with scenario questions tied to role boundaries
- Best: simple scoring guide so decisions aren't purely "gut feel," especially for public-facing roles

#### Common mistakes

- Using different standards for different candidates
- Skipping scenario questions for public-facing roles
- Selecting for "enthusiasm" and ignoring availability or boundary-following
- Leaving decisions undocumented

#### Example: Role-specific (Customer Service Desk Volunteer)

Ask: "What do you do when you don't know the answer?" "How do you handle a frustrated person?" "Tell me about a time you followed a process you didn't fully agree with."

---

## STAGE 3: ONBOARD

Onboarding is where expectations become real. It introduces the district’s mission, how volunteers fit into service delivery, and—most importantly—how volunteers receive direction and support. A strong onboarding process prevents drift by establishing boundaries, escalation points, and communication norms before the volunteer ever has to improvise.

Onboarding also protects the volunteer experience. Volunteers want to contribute successfully, and they typically appreciate clarity about what they are authorized to do, what is staff-only, and what to do when uncertainty appears. When onboarding is consistent across roles, the district reduces confusion, improves confidence, and builds a program culture where asking for help is normal—not a sign of failure.

### Primary owner(s)

- Program Owner: sets onboarding content and ensures consistency
- Role Supervisor: covers role-specific expectations and introduces the work area
- Admin support: collects forms and confirms completion

### Minimum steps (must do)

- Explain district mission, volunteer purpose, and where the role fits
- Confirm supervision chain (who directs work and how to reach them)
- Review expectations for conduct, reliability, and communication
- Cover confidentiality basics and “staff-only topics”
- Review incident/concern reporting and escalation triggers
- Complete required paperwork before work begins

### Good / Better / Best

- Good: standard orientation + role briefing
- Better: onboarding checklist with initials/sign-off
- Best: role risk-based onboarding add-on (public-facing scripts, youth boundaries, access limits)

### Common mistakes

- Treating onboarding as “here’s where things are” only
- Starting volunteers before paperwork and expectations are complete
- Not clarifying escalation or who to contact
- Assuming volunteers “already know” professional boundaries

Example: Role-specific (Customer Service Desk Volunteer)

Review: where scripts live, what questions are “general info,” what triggers immediate handoff (complaints, policy interpretation, safety issues, media, public records).

---

#### STAGE 4: TRAIN & AUTHORIZE

Training is the bridge between good intentions and consistent performance. It ensures volunteers can perform role tasks safely, accurately, and in a way that aligns with district expectations. This stage is where the district teaches the “how” of the work—task steps, scripts/templates where applicable, and the boundaries that keep volunteers from being placed in unfair or unsafe situations.

Authorization is the district’s clear line of accountability: what a volunteer is cleared to do independently, what still requires shadowing, and what always belongs with staff. This clarity reduces role creep, protects public trust, and supports supervision. When training and authorization are role-based and documented (especially for medium and higher exposure roles), the district can scale the program more confidently and respond more consistently when questions or incidents arise.

Primary owner(s)

- Role Supervisor: provides training, confirms competence, authorizes tasks
- Program Owner: sets minimum training requirements by role tier
- Peer mentor/buddy (optional): supports shadowing

Minimum steps (must do)

- Use a role-based training checklist
- Train task steps + safety basics relevant to the environment
- Teach boundaries and escalation triggers (“stop and ask”)
- Document completion for medium/high exposure roles

- Provide a shadowing period for public-facing or higher exposure roles

#### Good / Better / Best

- Good: checklist + shadowing for first shift(s)
- Better: staged authorization (phase 1 tasks → phase 2 tasks)
- Best: short skills confirmation (“show me”) for higher exposure roles

#### Common mistakes

- Assuming “watch once” = trained
- Allowing volunteers to improvise when they hit uncertainty
- Not documenting authorization for medium/high exposure roles
- Giving access before training is complete

#### Example: Role-specific (Customer Service Desk Volunteer)

Phase 1: greet, route calls, use FAQ for basic questions.

Phase 2: respond using templates, manage shared inbox categories.

Always escalate: complaints, policy interpretation, safety, media, public records.

---

## STAGE 5: SUPPORT & RETAIN

Support is where the program becomes sustainable. Most volunteer issues are not character issues—they’re expectation gaps, confidence gaps, or communication gaps that show up after the first few shifts. Early check-ins, quick coaching, and clear feedback prevent small issues from becoming big ones, and they keep performance aligned with role boundaries over time.

Retention is also a capacity strategy. When districts support and recognize volunteers appropriately, the program stabilizes: fewer last-minute gaps, fewer repeated onboarding cycles, and stronger continuity for the public and staff. This stage creates the feedback loop that helps the district refine scripts, training, and role design based on real patterns—not assumptions.

#### Primary owner(s)

- Role Supervisor: check-ins, feedback, schedule support
- Program Owner: program-level retention practices and recognition approach

### Minimum steps (must do)

- Conduct early check-in (after 2–3 shifts or within 2–3 weeks)
- Conduct stability check-in (around 60–90 days)
- Provide feedback and refresh expectations periodically
- Update scripts/training when patterns show confusion
- Recognize contributions in ways that fit district culture

### Good / Better / Best

- Good: consistent check-ins and quick coaching
- Better: quarterly touchpoints for medium/high exposure roles
- Best: annual refresher training for public-facing, youth, field, or access-heavy roles

### Common mistakes

- Only addressing issues when they become “big”
- No feedback for good performance (volunteers drift away quietly)
- Letting “informal workarounds” replace clear expectations

### Example: Role-specific (Customer Service Desk Volunteer)

Review log themes monthly: repeated questions, escalation triggers, script updates needed.

---

## STAGE 6: REDIRECT / PAUSE / REMOVE

This stage exists because every volunteer program will eventually face a mismatch, a boundary issue, or conduct that doesn’t align with expectations. A clear process protects the district from inconsistency and protects the volunteer from confusion. It also protects staff from carrying problems “forever” because no one is sure how to respond—or who has authority to act.

This stage also reinforces program credibility. When the district responds early and consistently—coaching when appropriate, redirecting when fit is the issue, and pausing or removing when safety or serious misconduct is present—it strengthens culture and public

trust. The goal is not punishment; the goal is clarity, fairness, and risk-aware decision-making that keeps the program healthy.

#### Primary owner(s)

- Role Supervisor: coaching and role redirection
- Program Owner: approves removals for serious issues and ensures consistency

#### Minimum steps (must do)

- Coach first for most issues: clarify expectation → retrain → confirm improvement window
- Redirect to a better-fit role when feasible
- Pause/remove immediately for serious issues (safety threats, boundary violations with youth/vulnerable people, dishonesty, harassment, refusal to follow direction)
- Document decisions briefly and factually

#### Good / Better / Best

- Good: consistent coaching and timely action
- Better: standard “concern report” and decision notes
- Best: a small review step for removals to ensure consistency across roles

#### Common mistakes

- Tolerating issues too long and then reacting abruptly
- Handling similar issues differently depending on who supervises
- Avoiding difficult conversations until trust has already eroded

#### Example: Role-specific (Customer Service Desk Volunteer)

If they repeatedly interpret policy or promise outcomes: pause desk shifts, retrain, re-authorize with limits, or redirect to non-public-facing role.

---

## STAGE 7: EXIT & OFFBOARD

Offboarding is both risk control and relationship management. It ensures district property is returned, system access is removed, records are closed, and loose ends do not become

future problems. This stage matters even when the exit is positive and planned—because access and accountability are easiest to manage when they follow a consistent checklist.

Exit is also an improvement opportunity. Short, respectful feedback can reveal where volunteers felt unclear, unsupported, or underutilized, and that information helps refine recruitment, training, and supervision. Done well, offboarding leaves the door open: volunteers may return, refer others, or continue supporting the district in different ways—even after their current role ends.

#### Primary owner(s)

- Role Supervisor: confirms last day and returns property
- Program Owner/Admin: removes system access and closes records

#### Minimum steps (must do)

- Retrieve district property (badge/keys/equipment)
- Remove system access promptly
- Record end date and reason category (brief and factual)
- Capture short feedback (what worked, what didn't)
- Ensure any open items are closed (logs, assignments)

#### Good / Better / Best

- Good: offboarding checklist used every time
- Better: same-day access removal standard
- Best: program-level exit trend review (why people leave, what to fix)

#### Common mistakes

- Leaving access active “just in case”
- Forgetting keys/badges and then scrambling later
- No feedback loop to improve the program

#### Example: Role-specific (Customer Service Desk Volunteer)

Remove shared inbox access, collect any printed scripts, confirm property return, close out inquiry logs.

Volunteers and employees can both be essential to a district’s mission, and they are not interchangeable. In general, an *employee* performs work in an employment relationship and is paid wages subject to wage-and-hour rules, taxes, and (typically) employee benefits and HR systems. A *volunteer* for a public agency serves primarily for civic/charitable/humanitarian reasons and does so without promise, expectation, or receipt of compensation for services rendered, with some limited exceptions that may be allowed (like reimbursed expenses, reasonable benefits, or a nominal fee that is not tied to productivity).

The practical “watch-out” is that volunteer programs can drift into employee-like territory when roles become core staffing, required schedules become rigid, or payments start looking and functioning like wages. Federal rules also restrict a public agency’s current employees from “volunteering” to do the same type of services for that same public agency.

---

**QUICK LOOK: VOLUNTEER VS. EMPLOYEE**

<b>Topic</b>	<b>Volunteer (public agency context)</b>	<b>Employee</b>
Primary purpose	Civic/charitable/humanitarian service.	Work performed as part of an employment relationship.
Compensation	Generally no “compensation for services,” though a public agency may provide expense reimbursement, reasonable benefits, and/or a nominal fee under specific conditions.	Wages/salary are paid; wage-and-hour rules apply.
Nominal fee (**special note**)	** Applies to FIREFIGHTER OR EMS roles only**  A nominal fee is not a substitute for compensation and should not be tied to productivity; public agency volunteer rules are fact specific.	Pay is compensation and can be structured around hours, premiums, incentives, etc.

<b>Topic</b>	<b>Volunteer (public agency context)</b>	<b>Employee</b>
Ability to say “no” / voluntariness	Must be offered freely (not coerced). If it starts looking like required staffing, revisit design.	Work is assigned/required as part of the job (subject to policy/CBA/law).
Protected leaves (FMLA, OFLA, Oregon Sick Time, Paid Leave Oregon)	Generally, not applicable. Helps in avoidance of drifting into employee-like structures.	Applies to eligible employees: FMLA is job-protected leave for eligible employees of covered employers. OFLA provides protected leave for eligible employees (thresholds apply). Oregon sick time provides protected sick time for workers. Paid Leave Oregon covers most employees who meet eligibility rules.
Vacation / PTO	Not typically provided. If you start providing vacation-like benefits or paying “time off,” it can push the relationship toward employee-like treatment.	Common employee benefit (policy/CBA-driven); used/approved under employer rules.
ADAAA / disability accommodations	Employment ADAAA (Title I) generally applies in the employment context; volunteers may not fit that category. Separately, as a public entity the district must provide people with disabilities equal opportunity to participate in its programs, services, and activities (ADA Title II), which can overlap with volunteer participation.	ADAAA/ADA Title I applies to covered employers and protects qualified employees/applicants; requires reasonable accommodations (subject to the law’s standards). <i>(Specific application depends on facts.)</i>

Topic	Volunteer (public agency context)	Employee
Direction and control	Volunteers receive direction/supervision, and “too much” control + compensation can start to look like employment.	Employer generally controls the work, performance expectations, discipline, and scheduling (subject to policy/CBA/law).
“Same public agency / same type of services” limit	Public agency employees generally can’t “volunteer” for the same public agency to do the same type of services they’re employed to perform (fact-specific).	Not applicable (they’re employees doing assigned duties).
Performance management	Managed through volunteer expectations/agreements: coaching, role adjustment, and removal as needed.	Formal performance management and discipline processes apply (policy/CBA/law).
Separation / termination	Typically ends through resignation or removal from the volunteer role; offboarding focuses on access/property/records.	Separation triggers final pay, benefits, and other legal/policy obligations.

**WRAP-UP: BUILDING A VOLUNTEER PROGRAM THAT WORKS ON PURPOSE**

Volunteerism is one of the best parts of public service. Oregon special districts are built to serve communities, and volunteers often bring the extra capacity, local knowledge, and “we’ve got this” energy that turns good intentions into real outcomes. When a district invests in a well-designed volunteer program, it creates a win for everyone: volunteers feel valued and successful, staff gain support instead of surprises, and the public experiences consistent, mission-aligned service.

Planning on the front end is the difference between a program that feels steady and one that feels like a series of emergencies in matching t-shirts. A clear purpose, defined roles, thoughtful supervision, and role-based guardrails reduce the odds that a volunteer will be

put in an unfair position or that the district will be caught reacting instead of leading. This guide is designed to help you build a program you can explain, repeat, and improve—one that holds up through staff turnover, board changes, and the natural evolution of district needs.

As you close this guide and turn to next steps, keep it simple: start with what matters most, assign ownership, and build momentum through consistent follow-through. Volunteers are a tremendous asset, and the most effective programs treat that asset with the same care you give any other part of district operations—clear expectations, consistent support, and a structure that makes success more likely than stress.

### Key takeaways

- Volunteer programs perform better when they are designed intentionally—purpose first, roles second, people third.
- Roles need boundaries (“authorized / not authorized / escalate when”) so volunteers can help confidently and staff can support consistently.
- Supervision is a program feature, not an afterthought—assign responsibility clearly and make escalation easy.
- Risk is multi-lens: operational realities, legal/compliance considerations (not legal advice), and insurance/risk partner expectations all matter.
- Not every role needs the same level of process—scale screening, training, and documentation to the role’s risk level.
- Track 1 (Program Design & Stewardship) prevents many problems before they appear, and Track 2 (Volunteer Engagement & Operations) keeps the day-to-day consistent.
- Training plus authorization reduces drift—the district decides what volunteers are cleared to do and when staff takes over.
- Check-ins are retention and risk tools—early feedback prevents small issues from becoming big ones.
- Offboarding protects the district and the relationship—remove access, collect property, close records, capture learning.
- Clarity protects volunteer status—when volunteer roles start to look like staffing, pause and reassess design with appropriate advisors.



**Federal (FLSA: volunteers and public agencies)**

[eCFR: 29 CFR Part 553, Subpart B \(Volunteers\)](#) - Primary federal regulation text.

[eCFR: 29 CFR 553.106 \(Expenses, benefits, nominal fee\)](#) - Nominal fee/expense framework.

[DOL eLaws: Public sector employees volunteering](#) - Includes “same type of services” discussion.

[DOL WHD Opinion Letter FLSA2007-3NA \(nominal fee example\)](#) - Example analysis for stipends/call fees.

**Accessibility (public entities)**

[ADA.gov: Title II - State and Local Governments](#) - Programs, services, and activities accessibility obligations.

[ADA.gov: Title II regulations \(2010\)](#) - Regulatory hub and background.

**Public records and records retention (Oregon public bodies)**

[Oregon DOJ: Attorney General’s Public Records & Meetings Manual](#) - Comprehensive manual and appendices.

[Oregon SOS Archives: Records Retention Schedules](#) - Retention schedules and annotated guides.

[County & Special District General Records Retention Schedule \(Annotated PDF\)](#) - Current schedule guide (PDF).

**Safety training resources**

[Oregon OSHA: Education and training](#) - Courses, materials, and training guidance.

**Respectful workplace guidance**

[BOLI: Respectful Workplace Policy](#) - Model guidance for conduct expectations and reporting.

## DEFINITIONS

*(Plain-language glossary for this guide. Some terms have specific legal meanings that can vary by context. This is not legal advice.)*

### **Access control**

Limits on who can enter certain spaces or systems (keys, badges, passwords, logins) and how access is granted, tracked, and removed.

### **ADA / ADAAA**

The Americans with Disabilities Act (as amended by the ADA Amendments Act). In the **employment** context (Title I), it addresses disability discrimination and reasonable accommodations for qualified employees/applicants. In the **public entity** context (Title II), it requires state and local governments to provide people with disabilities equal opportunity to participate in and benefit from programs, services, and activities.

### **Authorization**

The district's explicit "you are cleared to do this" decision for a volunteer task/role—often after training/shadowing. Authorization should match role risk and be updated when tasks change.

### **Background check**

A screening process that may include identity verification and checks of criminal history and other records, depending on the role and district practice. Not all roles require the same level of screening.

### **Boundary**

A clear limit on what a volunteer is allowed to do or say, and when to hand off to staff. Boundaries protect volunteers from being placed in unfair/unsafe situations and protect the district from role drift.

### **Confidential information**

Information that should not be shared broadly because it is legally protected, sensitive, or entrusted to the district (examples: personnel matters, protected personal data, patron/customer account details, medical information, investigation details, certain security information).

### **Confined space**

A space that is large enough to enter, has limited entry/exit, and is not designed for continuous occupancy (examples: vaults, pits, tanks, lift stations). These spaces can contain severe hazards and typically require specialized procedures and training.

### **Duty of care**

A general concept that the district must act reasonably to prevent foreseeable harm to people it serves and those participating in its activities. The standard of “reasonableness” rises as risk rises (youth programs, aquatics, emergency response, hazardous environments).

### **Employee**

A person working in an employment relationship—generally paid wages/salary and subject to wage-and-hour rules, payroll taxes, and employment policies/benefits (as applicable). Employees may also be covered by protected leave laws if eligible.

### **Escalation**

The defined handoff process to staff when a situation exceeds volunteer scope or becomes sensitive, unsafe, or uncertain. Clear escalation prevents volunteers from “handling what they shouldn’t.”

### **FLSA**

The federal Fair Labor Standards Act. Governs minimum wage, overtime, and related wage-and-hour rules, including specific concepts for public agency volunteers.

### **FMLA**

The federal Family and Medical Leave Act. Provides job-protected leave to **eligible employees** of covered employers for qualifying reasons (subject to eligibility and program rules).

### **Good faith / “coach first”**

An approach that addresses most volunteer performance issues through early feedback, clarification, and retraining—while still allowing immediate pause/removal for serious misconduct or safety threats.

### **Incident / Near-miss**

An **incident** is an event that causes harm or damage (injury, property damage, safety event). A **near-miss** is an event that could have caused harm but didn’t—useful for learning and prevention.

### **Indemnification**

A contract/policy concept where one party agrees to cover certain costs or losses of another party. Public entities often have limits on indemnification; this is typically a legal counsel/risk partner topic.

### **Insurance / risk partner**

The district's risk pool, carrier, broker, or risk management partner. They help confirm coverage expectations, reporting timelines, and recommended role-specific controls.

### **Job-protected leave**

A protected leave that provides eligible employees the right to take leave for qualifying reasons and return to the same or equivalent job (subject to the program's rules).

Examples include FMLA and OFLA for eligible employees.

### **Nominal fee**

A limited payment concept sometimes permitted for **public agency volunteers** under federal wage-and-hour rules. A nominal fee is not intended to substitute for wages and should not be tied to productivity like compensation. Whether a fee is "nominal" is fact-specific and looks at the overall structure (amount, frequency, duties, time demands, and how it compares to what paid employees earn for similar work).

### **Nominal fee – "20% guidance" (special clarification)**

The U.S. Department of Labor has described a practical benchmark in guidance (commonly referenced in opinion letters): a fee is generally more likely to be viewed as nominal if it does **not exceed about 20% of what the public agency would otherwise pay to hire a full-time employee to perform the same (or comparable) services**. This is guidance—not a bright-line statutory cap—and it must be evaluated in context. It is most often discussed in **public safety volunteer programs (fire/EMS)**, and the concept can come up in other public agency volunteer settings depending on facts.

### **OFLA**

Oregon Family Leave Act—Oregon's protected leave law for eligible employees (rules and coverage differ from FMLA). Often interacts with Paid Leave Oregon and Oregon sick time.

### **Oregon sick time**

Oregon's sick time law requiring employers to provide protected sick time (paid or unpaid depending on employer size and other rules). Applies to eligible workers/employees—volunteers generally don't accrue sick time unless they are treated as employees.

### **Paid Leave Oregon (PLO)**

Oregon's statewide paid family and medical leave insurance program for eligible employees/workers who meet program requirements.

### **Public agency / public entity**

A state or local government organization (including special districts). Public entities often

have additional legal obligations and public expectations (transparency, recordkeeping, equal access, stewardship of public resources).

### **Public records**

Documents/communications created, received, used, or retained by a public body in connection with public business—often including emails, messages, logs, and documents, regardless of device or format. Volunteer work-related communications can become public records if they meet the definition.

### **Record retention**

Rules and schedules that define how long public records must be kept and when they can be destroyed. Retention is usually dictated by state schedules and district practices.

### **Reasonable accommodation**

A change or adjustment that enables a qualified person with a disability to participate or perform in a context covered by law. In employment, it's tied to essential job functions; in public programs, it's tied to meaningful access and equal opportunity.

### **Reasonable benefits**

Non-wage benefits a public agency may provide to volunteers in some circumstances (examples vary by program and context). The key idea is that benefits should not function like wages or substitute for compensation.

### **Role description**

A written description of volunteer duties, boundaries, time expectations, supervision, and requirements. Role descriptions drive screening, training, supervision, and risk guardrails.

### **Role risk tier (Low / Medium / Higher exposure)**

A practical classification used in this guide to scale screening, training, supervision, documentation, and boundaries based on exposure (public-facing, youth contact, driving, equipment, system access, money handling, off-site work).

### **Scope of practice**

A defined boundary on what a person is trained/authorized to do—often used in medical/EMS contexts (what tasks are permitted at a given certification level and under what supervision).

### **Screening / selection**

The process of evaluating volunteer fit for a role (availability, communication, boundary-following, skills, and background checks as needed). The goal is matching people to roles they can succeed in safely.

**Staff-only topics**

Issues volunteers should not handle: legal advice, formal complaints beyond intake, personnel matters, protected/confidential records, policy interpretation, media statements, and other topics reserved for authorized staff.

**Stipend**

A general (non-legal) term for a fixed payment provided for service. In volunteer contexts, a stipend may or may not fit within the “nominal fee” concept depending on amount, structure, frequency, duties, and how it compares to what paid employees earn.

**Supervision**

The district’s ongoing responsibility to provide direction, feedback, and oversight for volunteer work. Effective supervision includes availability for escalation and clear authority to pause/redirect work.

**Training sign-off**

A record that a volunteer completed required training for a role and understands boundaries and escalation expectations. Most important for public-facing, youth-facing, access-heavy, off-site, or higher-exposure roles.

**Undue hardship**

A legal concept used in employment accommodation discussions referring to significant difficulty or expense relative to an employer’s resources and operations (fact-specific).

**Volunteer**

In a public agency context, a person who offers service for civic/charitable/humanitarian reasons without expectation of wages for the work performed. Some reimbursements/benefits or nominal fees may be permissible depending on structure and context.

**Volunteer agreement / acknowledgment**

A document confirming the volunteer understands role expectations, boundaries, conduct standards, and reporting/escalation channels. It supports consistency and reduces “I didn’t know” moments.

**Volunteer vs. employee drift**

A practical warning concept: when volunteer roles start to look like staffing (rigid schedules to cover core operations, compensation that resembles wages, high control paired with pay, or volunteers doing the same type of services as paid staff), the district should pause and reassess role design with appropriate advisors.

## VOLUNTEER POLICY (TEMPLATE)

Use this template to document district-wide volunteer program rules that apply across all volunteer roles.

### **Template Disclaimer and Document Ownership Map**

*This template is general guidance and is not legal advice. It must be customized to match your organization’s operations, insurance/risk pool requirements, and risk-based decisions about how volunteers will be used. Volunteer programs are fact-specific.*

### **What this Core Policy owns (the “program rules” for volunteers)**

- *Volunteer relationship expectations (voluntary service; not an employment relationship)*
- *Program structure and supervision expectations (who directs volunteer work and how issues are handled)*
- *Baseline conduct and reliability expectations (respect, professionalism, attendance/call-out expectations)*
- *Communication norms (who to contact; how volunteers represent the organization; public records awareness)*
- *Safety expectations at a policy level (stop-work authority; how to report hazards/incidents using your reporting process)*
- *Common risk-zone guardrails (access, assets, money, driving/off-site activities, youth/vulnerable populations—when applicable)*
- *Records/retention expectations for volunteer program documents*

### **What the Employee Handbook owns (and how it connects)**

*The Employee Handbook governs employees and employment matters (pay, benefits, protected leaves, employee discipline/performance processes, and other employment-specific policies). This Volunteer Program Core Policy applies to volunteers.*

*Where an organization-wide standard is intended to apply to both employees and volunteers (for example, respectful workplace standards, safety rules, acceptable use of facilities/technology, or public records/records retention expectations), this Volunteer Policy should reference that standard by name. Any differences for volunteers should be stated clearly in the Volunteer Policy or in a volunteer-specific addendum.*

**Forms and role documents that are separate from this policy**

- *Volunteer Application / Intake Profile (baseline information and availability)*
- *Volunteer Role Description (role-specific duties, boundaries, supervision contact, physical demands)*
- *Volunteer Agreement & Acknowledgements (signed expectations and receipts)*
- *Training Checklist and Training Sign-Offs (role-specific training and authorization)*
- *Incident / Concern Reporting Method (your reporting process and forms)*

**VOLUNTEER POLICY**

**1. Policy Information**

Organization/District Name: \_\_\_\_\_

Effective Date: \_\_\_\_\_ Review Cycle:  Annual  Biennial  Other:  
\_\_\_\_\_

Policy Owner (program-level): \_\_\_\_\_

Primary Contact for Questions: \_\_\_\_\_

Related Policies/References (by name):  
\_\_\_\_\_

**2. Purpose and Scope**

This policy establishes district-wide rules and expectations for volunteer participation to support safe, consistent, and respectful service delivery. It applies to all volunteers serving on behalf of the organization, regardless of role, location, or schedule.

Role-specific requirements (screening, training, supervision, access, and boundaries) are defined in each Volunteer Role Description and in any role-tier addenda used by the organization.

**3. Definitions (Customize)**

Volunteer: A person who offers service for civic/charitable/humanitarian reasons without expectation of wages for work performed, subject to applicable law and program design.

Program Owner/Admin: The person accountable for program design, consistency, records, and oversight at the program level.

Role Supervisor: The staff member who provides day-to-day direction, feedback, and escalation support for a specific volunteer role.

Role Risk Tier (if used): A practical classification (Low/Medium/Higher exposure) used to scale screening, training, supervision, and documentation requirements based on exposure.

#### **4. Volunteer Relationship and Status**

##### **4.1 Voluntary service (not employment)**

Volunteer service is offered freely and is not an employment relationship. Volunteers are not employees and are not entitled to wages or employee benefits unless required by applicable law. Volunteer participation may be ended by either the volunteer or the organization at any time, consistent with program needs and applicable policy.

##### **4.2 Reimbursements/benefits (if offered)**

If the organization offers reimbursement of approved expenses or reasonable volunteer benefits, the criteria and process must be documented and applied consistently. Any reimbursement/benefit practices should not function like wages or substitute for compensation.

##### **4.3 Avoiding volunteer vs. employee drift**

Volunteer roles should be designed and supervised to avoid drifting into employee-like territory (for example, using volunteers as core staffing to cover required shifts, creating rigid schedules that function like staffing, or offering payments that resemble wages). If drift indicators appear, the Program Owner should pause and reassess role design.

#### **5. Eligibility and Participation Limits (Customize)**

Minimum age requirements (if any): \_\_\_\_\_

Role-based requirements (licenses/certs) are defined in the Role Description.

Employees volunteering: If the organization allows employees to volunteer, confirm that employees are not volunteering to perform the same type of services they are employed to perform (fact-specific; confirm with advisors as needed).

## **6. Program Structure, Supervision, and Communication**

### **6.1 Ownership and supervision**

Program Owner/Admin responsibilities (program-level): consistency, approvals for exceptions, records oversight, and escalation support.

Role Supervisor responsibilities (role-level): day-to-day direction, availability for escalation, and timely feedback/coaching.

Volunteers must follow direction from assigned staff and use the escalation path defined for their role.

### **6.2 Communication norms**

Primary communication method(s):  Email  Phone  Text  Scheduling tool  Other:

\_\_\_\_\_

Volunteers should not provide official statements on behalf of the organization unless explicitly authorized.

Volunteers should not interpret policy, promise outcomes, or handle staff-only topics; they should escalate those items to staff.

## **7. Scheduling and Reliability Expectations**

Scheduling method and who assigns schedules:

\_\_\_\_\_

Call-out process (who to contact and when):

\_\_\_\_\_

No-show / repeated lateness response (program-level standard):

\_\_\_\_\_

Volunteers are expected to communicate promptly when availability changes.

## **8. Standards of Conduct and Respectful Service**

Volunteers represent the organization while serving and are expected to maintain respectful, professional conduct with staff, other volunteers, and the public.

Treat all people with courtesy and dignity; follow the organization's respectful workplace standard.

Follow staff direction and stay within role boundaries.

Avoid conflicts of interest and disclose potential conflicts to the Role Supervisor or Program Owner.

Do not accept gifts, money, or gratuities in connection with volunteer service unless permitted by policy.

If the organization has a Respectful Workplace/Harassment/Discrimination policy that applies organization-wide, reference it here by name and state whether and how it applies to volunteers.

## **9. Confidentiality, Privacy, and Public Records Awareness**

Volunteer roles may involve access to sensitive information. Volunteers must follow role-specific confidentiality expectations and access limits defined by staff and documented in role materials.

Access is provided on a minimum-necessary basis; volunteers should not seek or use information outside their role.

If a separate confidentiality agreement is required for certain roles, it must be completed before the volunteer begins those duties.

Public records awareness: Volunteer work-related communications and documents may be public records for public bodies. Volunteers must use approved communication channels and follow records expectations.

## **10. Safety Expectations and Stop-Work Authority**

Safety is a program expectation. Volunteers must follow safety instructions provided by staff and use required protective equipment where applicable.

Stop-work authority: Volunteers may pause work and notify staff if something feels unsafe or unclear.

Hazard, injury, and incident reporting: Volunteers must promptly notify staff and use the organization's reporting process/forms.

Emergency procedures: Volunteers must follow posted procedures and staff direction.

## **11. Common Risk-Zone Guardrails (Use only what applies)**

Not every volunteer role includes every exposure. Use this section to state program-level guardrails, and place role-specific details in Role Descriptions and role addenda.

### **11.1 Access, keys, badges, and systems**

Access is role-based and approved by the Program Owner/Role Supervisor.

Volunteers may not share passwords, badges, keys, or access credentials.

Checkout/return controls (if used): \_\_\_\_\_

### **11.2 Money, donations, and financial transactions (if applicable)**

Default rule: Volunteers do not handle money or financial transactions unless a role is explicitly designed, trained, and authorized for it.

If authorized, define controls (two-person rule, logs, staff oversight):

\_\_\_\_\_

### **11.3 Driving and off-site activities (if applicable)**

Default rule: Volunteers do not transport members of the public or other volunteers unless explicitly authorized.

If driving is authorized, define approval requirements and documentation (e.g., proof of license/insurance, permitted uses): \_\_\_\_\_

### **11.4 Working with minors or vulnerable populations (if applicable)**

Define supervision expectations, boundaries, and any screening requirements for these roles in role addenda.

Volunteers must follow staff direction and established safety boundaries at all times.

## **12. Concerns, Coaching, and Ending Volunteer Service**

Volunteers are managed through volunteer expectations: clarify, coach, and adjust the role or end service as needed. The organization uses a consistent approach to address issues early and to protect the public, volunteers, and staff.

Volunteers should raise concerns promptly with the Role Supervisor or Program Owner.

For minor issues: clarify expectations and provide coaching promptly.

For boundary/safety issues: pause or restrict duties as needed and escalate to the Program Owner.

The organization may end volunteer service or remove a volunteer from a role when expectations are not met or when program needs change.

## **13. Records, Retention, and Program Continuity**

Program records (applications, rosters, agreements, training sign-offs, communications/logs) must be stored in the organization's designated system/location.

Retention and destruction follow the organization's records retention rules and applicable public records requirements.

Volunteers should not keep program records on personal devices unless explicitly authorized.

## **14. Policy Review and Updates**

This policy will be reviewed on the schedule noted above and updated as program design, risk decisions, insurance requirements, or legal guidance changes. Role-level addenda may be updated more frequently to match operational realities.

VOLUNTEER ROLE DESCRIPTION FORM (TEMPLATE)

*Template disclaimer: This form is a tool to help document volunteer role expectations and boundaries. It must be customized for each organization and each volunteer role, consistent with the organization’s operational needs and risk-based decisions (including supervision expectations, access, and any role-specific restrictions).*

**ROLE DESCRIPTION**

**Role Identification**

**Volunteer Role Title:**

---

**Program/Department:**

---

**Primary Location(s):**

---

**Primary Staff Contact  
(Supervisor/Coordinator):**

---

**Backup Contact:**

---

**Role Purpose**

**Purpose of the Role (1–3 sentences):**

---

---

---

**Schedule and Commitment**

**Typical Schedule/Shift Options:**

---

---

**Expected Commitment:**

---

---

**Seasonal/Time-Limited Role:**  No  Yes If yes, timeframe:

\_\_\_\_\_

**Service Format:**  On-site  Remote  Hybrid

**Core Duties**

**Primary Duties (essential activities):**

---

---

---

---

---

---

---

---

**Secondary/Occasional Duties (as assigned/needed):**

---

---

**Role Boundaries**

**Authorized to:**

---

---

---

---

**Not authorized to:**

---

---

---

---

**When asked to do something outside role boundaries, volunteer should:**

---

---

**Required Qualifications**

**Minimum Qualifications:**

---

---

---

**Preferred Qualifications (if any):**

---

---

**Key Skills/Attributes:**

---

---

**Working Conditions and Physical Requirements**

**Work Setting:**

---

---

**Physical Requirements (check all that apply):**

- Standing/walking    Lifting/carrying up to: \_\_\_\_ lbs    Bending/stooping    Reaching/grasping

Driving (if part of role)  Outdoors/weather exposure  Other:

---

**Tools, Equipment, and Access Needed for the Role**

**Tools/Equipment Used:**

---

---

**PPE Required:**

---

**Access Needed (spaces/systems/materials):**

---

---

**Special Notes**

---

---

---

---

**Acknowledgement**

---

My signature on this form is in recognition of the service I will be assigned to complete in my volunteer capacity. I understand I am not an employee and will not be compensated as an employee.

**Volunteer Name:**

**Date:**

**Signature:**

**Staff Signature:**

\_\_\_\_\_

\_\_\_\_\_

**Role: Customer Service Desk Volunteer — Library**

*Sample disclaimer: This completed sample is provided as an example of how the Volunteer Role Description Form may be used. Organizations must customize content for their own operations, policies, and risk-based decisions (including supervision expectations, access, and role-specific restrictions).*

**Role Description**

**Volunteer Role Title:** Customer Service Desk Volunteer

**Program/Department:** Public Services / Circulation

**Primary Location(s):** Main Library — Customer Service Desk (Front Lobby)

**Primary Staff Contact (Supervisor/Coordinator):** Circulation Supervisor (or designee)

**Backup Contact:** Library Manager on Duty

**Role Purpose**

Support a welcoming, organized library experience by assisting patrons at the customer service desk with basic questions, directional guidance, and simple support tasks under staff supervision. This role helps keep service flowing during peak times while maintaining a friendly, respectful environment for all patrons.

**Schedule and Commitment**

**Typical Schedule/Shift Options:** 2–4 hour shifts during open hours; weekday daytime and early evening shifts available.

**Expected Commitment:** One shift per week for a minimum 3-month commitment (flexible based on library needs).

**Seasonal/Time-Limited Role:** No

**Service Format:** On-site

**Core Duties**

**Primary Duties (essential activities):**

- Greet patrons and provide a positive first point of contact; direct patrons to appropriate service areas and resources.
- Answer basic, non-confidential questions about library hours, policies, events, and how to locate materials or services.
- Assist patrons with self-service options as directed by staff.
- Support desk organization: maintain tidy public areas, replenish forms/supplies, and keep signage visible and current.
- Route requests or concerns to staff promptly, including patron complaints, policy questions, or escalations.

**Secondary/Occasional Duties (as assigned/needed):**

- Support light administrative tasks near the desk.
- Help monitor lobby flow and line management during peak traffic, under staff direction.
- Assist with simple wayfinding for accessibility needs and connect patrons to staff support when needed.

**Role Boundaries**

**Authorized to:**

- Provide general, publicly available information about library services and events.
- Offer directional assistance and basic support with self-service tools under staff direction.
- Perform simple desk-adjacent tasks that do not require access to confidential patron records.
- Refer questions, concerns, or incidents to staff promptly.

**Not authorized to:**

- Access, view, print, or discuss confidential patron records or account details.
- Make policy exceptions, resolve disputes, or provide final answers on policy interpretation.
- Handle cash, payments, or financial transactions unless explicitly designated and trained/authorized in writing by the library.
- Work unsupervised as the sole coverage at the customer service desk.
- Provide legal, medical, or professional advice to patrons; provide referrals only to library resources or staff.

**When asked to do something outside role boundaries, volunteer should:** Pause the task and contact the Circulation Supervisor or Manager on Duty for direction.

## **Required Qualifications**

### **Minimum Qualifications:**

- Reliable attendance and punctuality; ability to communicate respectfully with a diverse public.
- Ability to follow written and verbal instructions and ask questions when unsure.
- Basic comfort using a computer and common office equipment (training provided).
- Ability to maintain a calm, professional presence in a public-facing environment.

### **Preferred Qualifications (if any):**

- Prior customer service experience or experience working with the public.
- Interest in library services, community resources, and helping patrons connect to information.

### **Key Skills/Attributes:**

- Friendly communication, patience, and professionalism
- Situational awareness and appropriate escalation
- Confidentiality-minded behavior
- Teamwork and reliability

## **Working Conditions and Physical Requirements**

**Work Setting:** Public-facing indoor library environment with frequent patron interaction; moderate noise and foot traffic.

### **Physical Requirements:**

- Standing and walking for portions of the shift
- Sitting at the desk intermittently
- Light lifting/carrying (up to 15 lbs) such as stacks of flyers or small book bins
- Reaching, bending, and repetitive hand motions

## **Tools, Equipment, and Access Needed for the Role**

### **Tools/Equipment Used:**

- Library phone and basic office supplies

- Public-facing computer or kiosk (for general guidance only)
- Handouts, event calendars, library maps, and resource lists

**PPE Required:** None routinely; follow library guidance if conditions change.

**Access Needed (spaces/systems/materials):**

- Access to public lobby and customer service desk area
- Access to public-facing informational materials and desk supplies
- No access to confidential patron account systems unless formally authorized for the role by the library

**Special Notes**

This is a public-facing role. Volunteers are expected to maintain a welcoming environment, follow library conduct expectations, and escalate safety concerns, patron conflicts, or policy questions to staff immediately.

**Acknowledgement**

My signature on this form is in recognition of the service I will be assigned to complete in my volunteer capacity. I understand I am not an employee and will not be compensated as an employee.

<b>Volunteer Name:</b>	Sample Volunteer	<b>Date:</b>	January 20, 2026
	_____		_____
<b>Signature:</b>	_____	<b>Staff Signature:</b>	_____
	_____		_____
	_____		_____

*Template disclaimer: This application/intake profile is intended to collect consistent baseline information about prospective volunteers (identity, availability, interests, and basic qualifications). It must be customized to align with the organization's volunteer program design, role needs, and risk-based decisions. Do not use this form as a substitute for separate role descriptions, agreements/acknowledgements, training records, or incident reporting documentation.*

## Volunteer Application / Intake Profile

### Applicant Information

**Full Name:**

**Preferred Name (if different):**

**Phone:**

**Email:**

**Mailing Address:**

**Best way to reach you:**  Phone  Email  Text

**If text, mobile number (if different):**

---

### Availability

**Start date you are available to begin:**

**Preferred days/times (be specific):**

---

---

---

**How many hours per week/month are you hoping to volunteer?**

---

**Preferred length of commitment (e.g., 3 months, 6 months, ongoing):**

---

**Service format:**  On-site  Remote  Hybrid

**Are you able to volunteer on an occasional basis for special events?**  Yes  No  Maybe

**Volunteer Interests**

**What type of volunteer opportunities are you interested in?**

---

---

---

**What motivates you to volunteer with our organization?**

---

---

---

---

**Basic Qualifications**

**Relevant skills, strengths, or experience you bring (work, volunteer, school, community):**

---

---

---

---

**Languages spoken (optional):**

---

**Technology comfort (check all that apply):**

- Email  Web browsing  Data entry  Phone/Radio etiquette  Office equipment (printer/copier)  None/Prefer support

**Certifications/licenses (if any; list type and expiration):**

---

---

**Relevant Considerations**

**Are you able to perform volunteer tasks with or without accommodation?**  Yes  No

Prefer to discuss

**If you chose “Prefer to discuss,” what would you like us to know? (optional)**

---

---

**Do you have any schedule limitations or blackout dates we should plan around?**  No

Yes

**If yes, describe:**

---

---

**References (Optional)**

Provide 1–2 references who can speak to reliability and fit for volunteer service.

**Reference 1 – Name:**

---

**Relationship:**

---

**Phone:**

---

**Email:**

---

**Reference 2 – Name:**

---

**Relationship:**

---

**Phone:**

---

**Email:**

---

**For Organization Use Only**

Date Received: \_\_\_\_\_ Reviewed By: \_\_\_\_\_

Notes:

---

---

---

## VOLUNTEER AGREEMENT & ACKNOWLEDGEMENTS (TEMPLATE)

*Template disclaimer: This agreement documents the volunteer relationship and baseline expectations (conduct, rules, and acknowledgements). It must be customized to align with the organization's policies, program design, and risk-based decisions. This form is not legal advice.*

### Volunteer Agreement & Acknowledgements

#### Volunteer and Organization Information

**Organization Name:**

---

**Volunteer Full Name:**

---

**Volunteer Role Title (reference only):**

---

**Primary Staff Contact:**

---

**Effective Date:**

---

#### Volunteer Relationship

I understand and agree that my service is voluntary. I am not an employee of the organization, and I am not entitled to wages, employee benefits, unemployment benefits, or workers' compensation benefits provided to employees, unless required by applicable law. Nothing in this agreement creates an employment relationship, a promise of future employment, or a contract for a specific term.

Either I or the organization may end this volunteer relationship at any time, with or without notice, consistent with program needs and applicable policy.

#### Expectations and Rules

I will follow the organization's policies, procedures, and directions from staff while volunteering.

I will maintain respectful, professional conduct and contribute to a respectful workplace including a harassment and discrimination-free environment.

- I will respect patron/public interactions and treat all people with courtesy and dignity.
- I will use organization property, tools, and resources appropriately and only as permitted.
- I will not represent myself as an employee, agent, or spokesperson for the organization unless specifically authorized.
- I will notify my staff contact as soon as possible if I am unable to attend a scheduled shift/assignment.
- I will promptly report safety concerns, injuries, or other incidents to staff using the organization's reporting process.
- I will avoid conflicts of interest and disclose potential conflicts to my staff contact.
- I will not accept gifts, money, or gratuities in connection with my volunteer service unless permitted by organization policy.
- I will comply with applicable privacy/confidentiality expectations and will sign any additional confidentiality or media release forms if required for my role.

**Acknowledgements of Receipt (as applicable)**

- Code of Conduct / Standards of Behavior
- Safety Expectations Summary
- Privacy/Confidentiality Guidance (if applicable)
- Use of Facilities/Property Expectations
- Other: \_\_\_\_\_

**Signature Statement**

My signature on this form is in recognition of the service I will be assigned to complete in my volunteer capacity. I understand I am not an employee and will not be compensated as an employee.

**Signatures**

<b>Volunteer Name:</b>	_____	<b>Staff Signature:</b>	_____
<b>Volunteer Signature:</b>	_____	<b>Staff Name/Title:</b>	_____
<b>Date:</b>	_____	<b>Date:</b>	_____

