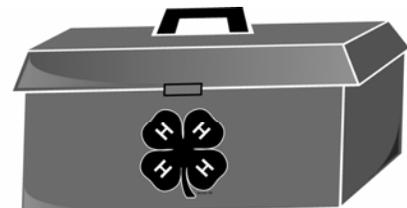


6

"Volunteer Screening Process" Lesson Plan





Learning Objectives

1. Explain the importance of following a screening process for 4-H Youth Development Program Volunteers.
2. Identify individuals who should complete the screening process.
3. List behaviors addressed in the volunteer screening process.
4. Follow appropriate procedures to screen and approve new 4-H Volunteers.
5. Explain the 4-H advisory board's role in the volunteer screening process.
6. Identify confidentiality issues related to the volunteer screening process.



Supplies & Resources Needed

- Lesson plan with instructional objectives
- Notes pages of PowerPoint presentation with talking points
- LCD projector and laptop with PowerPoint presentation loaded
- Copies of PowerPoint slides printed as a three-slides/page handout for each participant
- Flip-chart paper/dry-erase board or similar item and markers to record responses from discussion questions
- Copies of lesson plan quiz for each participant
- Pencils or pens for volunteers to take notes and complete the quiz
- Index cards with volunteer screening process scenarios
- Copy of "Volunteer Screening Process" fact sheet for each participant



References

Gordon, J.; McKee, R.; McKinley, S.; Rusk, C.; Nierman, A.; Emerson, J.; Kebert, M.; Williams, S.; Robertson, J.; & Dimmich, T. (2003). *Indiana 4-H Youth Program 4-H Policies/Procedures*. West Lafayette, IN: Purdue University Extension Service.

Vineyard, S. & McCurley, S. (1998). *Handling Problem Volunteers*. Downers Grove, IL: Heritage Arts Publishing.

Purdue University Personnel Services. (n.d.) *Discipline without Punishment*.

Branson, F. & Long, N. (n.d.) *Letting Go*. West Lafayette, IN: Purdue University Extension Service

Projected Length

30-35 minutes, depending upon length of time allowed for discussion questions.

Instructor Notes

- If you will be using the PowerPoint presentation to share this lesson with the volunteers, set up the laptop and LCD projector prior to the start of the program and test the equipment to be sure it is working properly.
- Welcome the group and thank them for their participation.
- Begin the "Volunteer Screening Process" PowerPoint presentation.
- Utilize the talking points found on the notes pages of the PowerPoint presentation to guide you during the presentation.



- Review the purpose and objectives for this lesson.
- Ask introductory questions of the participants related to volunteer screening.
- Provide a brief introduction of the lesson, including its importance to the 4-H Youth Development Program.
- Proceed with the lecture portion of the lesson.
- Divide the group into small groups of 2-3 and distribute a volunteer screening process scenario card to each small group.
- Allow time for each group to discuss its scenario and identify steps they would take if they were in this situation.
- Invite each small group to share their scenario and the solution they identified. Allow other small groups to also provide their input.
- Summarize the recommended procedure for each scenario before moving to the next one.
- Distribute the "Volunteer Screening Process" quiz to each participant. After participant completes the quiz, review the answers with them.
- Distribute the "Volunteer Screening Process" fact sheet to each participant.
- Conclude the lesson with a time for questions from the participants.

Methods/Content



Information found on Slides #1-2.

Introduction



Volunteers can be a tremendous help to the 4-H Youth Development Program! This lesson will describe the steps we take to bring these volunteers into the program. Here are some questions to ponder as we move through this lesson:

- *Can we accept any person as an adult in our program?*
- *What obligation do we have to ensure the safety of our students in the program?*
- *What do we do when someone we don't know offers to volunteer?*
- *What do we do when someone we know well offers to volunteer?*
- *Is there ever a time when we can say we don't have a position available for you to volunteer in our program at this time?*

Volunteers are a crucial part of youth-serving organizations. Volunteers enable the paid staff to reach a wider audience, and to share a greater variety of skills and expertise with that audience. Unfortunately, today's society is not as safe as in past years. Reports of adults taking advantage of children are too often in the headlines. In an attempt to maintain a safe learning environment, the 4-H Youth Development Program institutes a screening process for all adults who volunteer for the program. The procedures described in this lesson are followed for all adult volunteers who work with youth in our program.

Here are the objectives we will cover in this lesson.

Objective 1

Explain the importance of following a screening process for 4-H Youth Development Program volunteers.



Information found on Slides #3-4.





In today's society we all too frequently see and read reports of adults who have taken advantage of youth. Several youth organizations have suffered through the experience of having a volunteer or paid staff member be accused of improper contact or conduct with youth who participate in their programs. The screening process we are discussing is an attempt to be proactive and to prevent this type of behavior from occurring in the 4-H Youth Development Program. No policy can completely guarantee that it will eliminate all unacceptable behavior, but it can alert all who participate in our program that we are taking a reasonable and prudent approach to the well-being of our youth participants.

Further, the screening process . . .

- Ensures that youth in the 4-H Youth Development Program receive a high-quality education in a safe environment.
- Clearly identifies the expectations that the 4-H Youth Development Program has of its volunteers.
- Helps parents to confidently trust their children to our care.
- Allows all volunteers to reaffirm their commitment and dedication to the well-being of youth as they provide them with positive growth experiences.
- Documents volunteer excellence.
- Provides volunteers with support if accusations are made against them (as long as the volunteers are acting within the scope of their duties).



Now that we know the reasons behind a volunteer screening process, let's take a look at who should be involved.

Objective 2

Identify individuals who should complete the screening process.



Information found on Slides #5-6.

All individuals who wish to volunteer in any way with the 4-H Youth Development Program are included in and should complete the screening process. These include club leaders, project leaders, committee members, advisory board members, and any others who volunteer on a regular basis with the program.

Over time, individuals may assume different roles in the 4-H Youth Development Program. Asking the individual to complete the screening process in the beginning will allow them to move among roles more freely and without delay. 4-H Youth Development staff members are also encouraged to complete the screening process to show the volunteers that they support the procedures.



So, we've learned that all who are interested in serving as volunteers should complete the screening process. What does this screening process address?

Objective 3

List behaviors addressed in the volunteer screening process.



Information found on Slides #7-9.





What behaviors should be addressed in the screening process?

- Volunteers should be expected to follow the rules and guidelines established by the 4-H Youth Development Program, including those related to child abuse/neglect.
- Volunteers are expected to be a positive role model for youth.
- They should be courteous, be respectful, exhibit good sportsmanship, handle conflict reasonably, and be truthful.
- Volunteers will represent the 4-H Youth Development Program with dignity and pride, accept supervision and support from others, participate in orientation and training, and work to create an effective 4-H Youth Development Program.
- Volunteers will ensure equal access to programs.
- They will understand that physical and verbal abuse of others and criminal acts are not a part of the 4-H Youth Development Program.
- Volunteers will not allow, consume, or be under the influence of alcohol or illegal drugs at 4-H Youth Development events. Tobacco use will be limited to times when the volunteers are away from youth participants.
- Machinery and equipment will be operated in a responsible manner; animals will be treated humanely; and technology will be used appropriately.



These behaviors are ones that most reasonable adults should be able to follow without questions and they are the ones that we hope to instill in our youth. What procedures are we going to take to help ensure that we have volunteers who are willing to follow these procedures?

Objective 4

Follow appropriate procedures to screen and approve new 4-H Volunteers.



Information found on Slides #10-14.



What are the procedures for screening and selecting adult volunteers?

1. Applicant states a desire to volunteer in the program.
2. Applicant is sent a cover letter and provided with copies of:
 - a. "Information and Instruction for Staff and Volunteers Who Work with 4-H Youth Development Programs"
 - b. "Adult Volunteer Application"
3. Staff member starts a file for the volunteer applicant, including "Volunteer Application Checklist."
4. Applicant completes Adult Volunteer Application and returns it to the 4-H Youth Development staff member.
5. Staff member completes written or verbal reference checks provided by applicant using appropriate form.
6. Staff member conducts a Web search of a statewide sex/violent offender registry database using the applicant's name, birth date, and social security number (if provided).
7. Staff member places the successfully screened applicant in a volunteer position that is appropriate for his/her abilities and experiences.



8. Once the screening process is completed, the staff member presents a list of the successfully screened applicants to the advisory board for approval.
9. Staff member sends the applicant an acceptance letter, a copy of “Adult Behavioral Expectations” or “Youth Behavioral Expectations” and a locally produced volunteer position description.
10. Once the volunteer applicant returns the signed behavioral expectations form, he/she is recognized as an official 4-H volunteer.
11. The new volunteer is then sent information about future meetings and training opportunities. An orientation meeting with the staff member or designee and volunteer is also suggested.
12. If the applicant is rejected as a volunteer, the staff member sends a letter of notification to the applicant.
13. The staff member maintains an updated list of volunteers in the 4-H Youth Development office.
14. Dismissal of volunteers should be a last resort. If the process is working correctly, those volunteers having difficulty fulfilling their obligations should be contacted throughout the year to attempt to help them through difficulties they are having. If possible, consider reassignment, retraining, revitalizing, or referring before dismissal. Specific guidelines have been set for dismissing a volunteer that must be closely followed.



While the staff member is primarily responsible for the completion of the screening process, the Advisory Board can also have an important role. Let's look at this role in a little more detail.

Objective 5

Explain the 4-H advisory board's role in the volunteer screening process.



Information found on Slides #15-16.



What is the local 4-H Youth Development Advisory Board's role in enforcing the Adult Behavioral Expectations?

1. Assist staff member with encouraging all current volunteers to sign the Adult Behavioral Expectations (ABE) form.
2. Establish a policy to support the volunteer screening process for all new applicants.
3. Document to the staff member any incidents brought to your attention regarding volunteer performance.
4. Establish a procedure to follow when the behavioral expectations are not followed that is fair to all parties involved (consider grievance/appeal procedures).



By involving others beyond the staff with the screening process, there becomes a need to address confidentiality of information that is submitted during the screening process.

Objective 6

Identify confidentiality issues related to the volunteer screening process.



Information found on Slides #17-18.





What confidentiality issues should be considered?

1. All persons involved in the volunteer screening process should be informed of the importance of confidentiality.
2. All forms, applications, notes on references, background checks and interviews must be kept in a file which can be accessed only by 4-H Youth Development personnel or their designees. Volunteers should **not** have access to these files.
3. All information about applicants and why they are accepted or rejected as a volunteer must be treated in a confidential manner. Only authorized persons should be involved in discussing questionable applicants. Discretion and privacy must be used when screening and discussing applicants.
4. An applicant may have access only to the materials he/she has completed. Materials provided by others, including references, committee reports and interview notes, are **not** shared with the applicant/volunteer.
5. Any person who permits or encourages unauthorized disclosure of confidential information obtained from background checks can be charged with a class misdemeanor.



The important thing to remember is that volunteer files are very similar to personnel files that are kept on employees. Confidentiality of this information is crucial to the credibility of the program.

Volunteer Screening Process Scenarios



Information found on Slide #19.



We've been through a lot of information in this lesson. Let's review some possible scenarios related to volunteer management that 4-H Youth Development staff members may encounter and discuss how they can be handled.

Directions for Instructor

- Divide the group into small groups of 2-3 and distribute a volunteer screening process scenario card to each small group.
- Allow time for each group to discuss its scenario and identify steps they would take if they were in this situation.
- Invite each small group to share their scenario and the solution they identified. Allow other small groups to also provide their input.
- Summarize the recommended procedure for each of the scenarios before moving to the next one.
- Conclude the lesson with a time for questions from the participants.

Scenario 1. A person who has recently moved to the community comes to you with an offer to volunteer to assist as the local 4-H Club Leader. How do you handle this offer?



Recommended responses

- *Thank the adult for her willingness to assist with the 4-H Club.*
- *Explain to the adult the volunteer screening process and provide the necessary paperwork to the adult.*
- *Once the volunteer screening process is successfully completed, welcome the volunteer to the 4-H Youth Development Program.*



- Do not immediately place the new volunteer in charge of the 4-H Club; do not leave the adult unattended with youth.

Scenario 2. A potential new volunteer has provided a list of references to check. One of these references comes back with an unfavorable review. What does the 4-H Youth Development staff member do?



Recommended responses

- Check the other 2 references to see if any of the same concerns are addressed.
- Follow-up with the 3rd reference to see if he/she is willing to provide additional details.
- Confer with the supervisor regarding the unfavorable reference check.
- Together determine if the unfavorable review is enough to prevent the applicant from being a volunteer in the program.
- If the unfavorable review is related to a specific aspect of the applicant's behavior, visit with the applicant about ways to address and overcome that deficiency (but keep the reference's identity confidential). Place the applicant in a volunteer position that will allow him to use his strengths and not focus on the weak area(s) identified.
- One unfavorable reference check does not automatically disqualify an applicant from serving as a volunteer.

Scenario 3. A recent alum of your 4-H program is staying in the community and would like to volunteer with the 4-H Youth Development Program. What steps do you need to take?



Recommended responses

- Ask the recent 4-H alum to complete the screening process to become an adult volunteer.
- Complete the necessary steps as outlined in this lesson.
- Place the 4-H alum in a position where he will have the support of additional adult volunteers who have some more experience.
- Do not place the 4-H alum in a position of authority over the current students (due to closeness in age, this would be difficult for all involved.)
- Do not allow the 4-H alum to transport any of the students until he turns 21.

Scenario 4. Current volunteers in the 4-H Youth Development Program have not completed the volunteer screening process. How should you proceed with them?



Recommended responses

- Explain the procedures to the volunteers and the reasons behind implementing them.
- Invite the current volunteers to also participate in the screening process to show all families in the program the importance we place on providing a safe, secure environment for the students.
- Completing the application form and behavioral expectations should be sufficient for existing volunteers. Conducting reference and background checks is not likely to be necessary. However, if you have a concern about any one volunteer, all volunteers should be asked to follow the same procedures (so no individual is singled out).

Scenario 5. A current volunteer doesn't believe there is a need for the volunteer screening process and refuses to sign the paperwork you provide to her. How do you handle this situation?



Recommended responses

- Hopefully, the volunteer advisory board members have already approved this procedure and have completed their own paperwork. If so, some of these volunteers may be able to explain the importance of the procedures to the dissenting volunteer. Positive peer pressure may be useful here.
- Refusing to complete the paperwork may not be grounds for dismissal, but a note should be included in the volunteer's file that an attempt to complete the procedure was made and was refused.



- *Be on the alert for signs that there may be a reason the volunteer isn't willing to comply with the new procedures. Typically, someone with nothing to hide has no problem with completing the requested paperwork.*

Scenario 6. A former volunteer who left the program more than one year ago comes to you and is willing to once again volunteer for the 4-H Youth Development Program. Does the applicant need to complete the screening process again? Why or why not?



Recommended responses

- *Typically, any person who has not volunteered for the program for at least a year should be asked to complete the screening process again. Much can happen in a year and the protection of the youth is the top priority.*
- *However, if the volunteer is well-known by others in the program and has maintained contact with the program throughout the past year, the volunteer can be accepted back into the program without reapplying.*
- *Remember it is always better to err on the side of caution and that those with nothing to hide should have no reason to not want to provide this information.*

Scenario 7. A verbal report is made to you regarding a current volunteer in the program who was seen drinking alcohol at a 4-H event. How do you proceed with this report?



Recommended responses

The 4-H Youth Development staff member should:

- *First, ask the individual who made the report to put that report in writing and submit it to you immediately.*
- *Ask if there are any others who can verify the accuracy of this report. They, too, should be asked to provide a written report regarding the volunteer's behavior.*
- *Consult the supervisor about the situation and seek her advice. Consider how similar situations have been handled in the past to provide consistency in this situation.*
- *Ask for a meeting with the volunteer in question to address the allegation that has been made. Always involve a supervisor in the meeting; do not meet with the volunteer one-on-one. Hold the meeting in a conference room or in the supervisor's office.*
- *Discuss with the volunteer the concerns that have been raised regarding the volunteer's behavior. Invite the volunteer to share his side of the story. If the volunteer agrees with the report, proceed to the next step. If the volunteer does not agree with the report filed against him, seek additional information. Inform the volunteer that this information will be kept in his permanent file and that any additional incidents will result in disciplinary action.*
- *Outline steps that the individual needs to take to remain as an active volunteer in the program. Place the volunteer on probation for a year with explicit goals of how the volunteer should perform during that time. (e.g., at no times have evidence of alcohol while in association with youth in the 4-H Youth Development Program; participate in an alcohol awareness program)*
- *Reassign the volunteer to duties that do not involve the transportation of any students.*
- *Schedule follow-up meetings during the year to assess the progress the volunteer is making toward overcoming the problem he experienced.*
- *If this is a repeat violation, previous situations have been carefully documented, and the volunteer's behavior problem has been previously addressed with him, then take steps to terminate the volunteer from his position with the program. Follow-up the meeting with a letter detailing the disassociation of the volunteer from the program.*

Scenario 8. A volunteer club leader displays little patience with club members, often belittling them in front of the whole group. Parents and students have registered multiple complaints regarding this volunteer's behavior. Can this individual continue to volunteer in the program? If so, how?



Recommended responses

- *Be certain that you have kept careful, accurate records of all reports that have been filed.*



- *Schedule a meeting with the volunteer and a supervisor to address the volunteer's behavior.*
- *Point out the concerns that have been raised and show the volunteer how she has violated the Adult Behavioral Expectations that she agreed to during the screening process.*
- *Suggest a reassignment within the program where the volunteer will not have direct contact with the 4-H members.*
- *Offer to reassess the situation in a few months with the potential to assign the volunteer to her original duties if she desires to do so.*



These scenarios with volunteers are ones that may be fairly common in 4-H Youth Development Programs. It is important to be consistent in the implementation of the policies related to volunteer application and screening to maintain the integrity of the program. The guidelines and policies presented in this lesson are designed to protect the well-being of both the 4-H members and the adults who work with them (paid staff and volunteers).

Conclusion and Quiz



Information found on Slides #20-21.



This lesson has provided information to staff and volunteers related to the application and screening procedures utilized for volunteers in the 4-H Youth Development Program. Following these procedures will help to ensure that the youth in our programs are well cared for as they participate in 4-H Youth Development activities and events.

Briefly review the lesson and allow time for any questions from the volunteers related to the lesson. Then distribute the quiz questions. Allow volunteers time to answer the questions. Provide the correct answers from the key provided in this packet. You may choose to collect the quizzes or allow the volunteers to keep them as a review of the lesson.

Distribute the "Volunteer Screening Process" fact sheet to each participant.

Refer the volunteers to the resources provided on Slide 21 for additional information.

Thank the volunteers for their participation.

It is the policy of the Purdue University Cooperative Extension Service, David C. Petritz, Director, that all persons shall have equal opportunity and access to the programs and facilities without regard to race, color, sex, religion, national origin, age, marital status, parental status, sexual orientation, or disability. Purdue University is an Affirmative Action institution.

This material may be available in alternative formats.



Master of Scenarios Related to the Volunteer Screening Process
(Each printed on an index card without the explanation/solution)

Scenario 1. A person who has recently moved to the community comes with an offer to volunteer to assist as the local 4-H Club Leader. How do you handle this offer?

Scenario 2. A potential new volunteer has provided a list of references to check. One of these references comes back with an unfavorable review. What does the 4-H Youth Development staff member do?

Scenario 3. A recent alum of your 4-H program is staying in the community and would like to volunteer with the 4-H Youth Development Program. What steps do you need to take?

Scenario 4. Current volunteers in the 4-H Youth Development Program have not completed the volunteer screening process. How should you proceed with them?

Scenario 5. A current volunteer doesn't believe there is a need for the volunteer screening process and refuses to sign the paperwork you provide to her. How do you handle this situation?

Scenario 6. A former volunteer who left the program more than one year ago comes to you and is willing to once again volunteer for the 4-H Youth Development Program. Does the applicant need to complete the screening process again? Why or why not?

Scenario 7. A verbal report is made to you regarding a current volunteer in the program who was seen drinking alcohol at a 4-H event. How do you proceed with this report?

Scenario 8. A volunteer club leader displays little patience with club members, often belittling them in front of the whole group. Parents and students have registered multiple complaints regarding this volunteer's behavior. Can this individual continue to volunteer in the program? If so, how?



- KEY -

“Volunteer Screening Process” Quiz

1. Which 4-H volunteers should complete the Volunteer Screening Process?

ALL volunteers should complete the volunteer screening process.

2. Which of the following behaviors is not addressed in the Volunteer Screening Process?

- a. Be a positive role model for youth
- b. Refrain from physical or verbal abuse of others
- c. Not consume or be under the influence of alcohol or illegal drugs
- d. Use technology appropriately
- e. All of the above are addressed

Correct answer is “e”, all of the above

3. Describe basic procedures to screen a volunteer.

Include a summary of the procedures listed under Objective 4.

4. Who has access to a volunteer’s information?

The 4-H Youth Development Staff member or designee has access to a volunteer’s information.

