



Volunteer Coordinator Orientation

For all CML Volunteer Coordinators and Supervisors

Required for all Volunteer Coordinators

To be shared with Volunteer Supervisors

2021



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Worksite Agreements – added to the end of this draft

- Check numbering from here *

Our Values



Respect, integrity and inspiration are all values that reflect how we work with volunteers.

Take these values, add the behaviors listed above and the results are outcomes that reflect who we are.

1. All of our volunteers feel valued
2. Our volunteers trust us to do the right thing, and we in turn trust our volunteers to support the library and
3. As a team we provide timeless value and an always evolving excellence

We view our volunteers as full partners in the CML experience. By working hand-in-hand with staff, volunteers help the library execute the programs that make us great. This includes extending the library's values to the volunteer program.

Customer First

Volunteers Are First Our Customers

Viewing volunteers as customers creates a framework for everything we do.

The Customer First model of customer service applies to our volunteers.

- Volunteers begin their relationships with us as customers
- They become inspired to help out
- At the end of their time volunteering they return to us as customers.

How do we extend the Customer First model to our volunteers?

- Respond to applications in a timely manner, within 30 days
- Extend common courtesies to volunteers while they're on duty or off the clock. They're our internal and external customers. Treat them as you would any customer or co-worker
- Communicate changes about your location and library updates on a regular basis
- Show appreciation and thank them often for the service they provide

Who is a Volunteer?

A volunteer is anyone who works with us who is not on our payroll. Volunteers include:

- Regular volunteers
- VolunTeens
- Interns
- Practicum students
- Community Interns
- AARP Foundation program enrollees
- Work Study students
- Service Learning students
- Franklin County Job and Family Services workers
- Any other agency who places someone with us temporarily for pay in exchange for the experience

NOTE: The exception to this is a temporary employee.

Who can be a volunteer? Almost anyone from the community who has excellent literacy skills.

Potential volunteers who lack adequate literacy skills are sent a no thank you message.

Foreign nationals who wish to volunteer with us to improve their English skills are encouraged to work with other nonprofits, like the Columbus Literacy Council, to strengthen their English skills. Once they master English they are welcome to volunteer with us.

Volunteers who lack excellent literacy skills will not be successful in working with us, so we prefer not to put anyone in a position where they could fail.

The minimum age for volunteers includes:

Volunteer Program	Minimum and Maximum Ages
VolunTeens	12 to 17
All other volunteer positions*	16 and older

*In some communities HHC volunteers who are the same age as the customers using the HHC are not respectful of their peers. These branches then invite interested teens to participate in other volunteer activities outside of the HHC.

With the VolunTeen program, children younger than 12 at the start of SRC are welcome to participate the following year. Anyone 18 and older is considered an adult, so they are not eligible to participate as a VolunTeen.

Personalized, Yet Uniform Service

No matter where a volunteer works, they

- have the same expectations
- follow the same rules
- are treated the same way
- follow practices that are legally compliant

In placing volunteers, we take the special needs of each location into consideration.

We consider:

- The needs of your customers
- The challenges that you need to address in your day-to-day work

All locations use standardized:

- forms
- practices
- job descriptions
- job postings (online)
- policies and procedures
- time tracking for ALL volunteers

Staff Roles

At each location there are two tiers of staff who work with volunteers.

1. The leader or Volunteer Coordinator who manages the local program and
2. The Volunteer Supervisor(s) who oversee(s) the day-to-day work of the volunteers who support a program.

The **Volunteer Coordinator's** role is to:

- Serve as front-line communicators with Volunteer Services. The Coordinator relays updates and their location's requirements to Volunteer Services.
- Ensure that Volgistics is checked weekly
- Attend Coordinator meetings and shares information with the branch; in your absence you may send a Volunteer Supervisor to represent the location
- Ensure that all volunteers are managed, scheduled and trained by the Volunteer Supervisor
- Hold Volunteer Supervisors responsible for their volunteers

The **Volunteer Supervisor's** role is to:

- Communicate their needs to the Volunteer Coordinator
- Screen potential volunteers. Determine if the candidate is a good fit for the location, contact the candidates and perform a face-to-face interview with each potential volunteer
- Manage, including orienting and training, the volunteers
- Review the reports from Volunteer Services to ensure that volunteers are logging their time and that the report accurately reflects what the volunteers work
- Document volunteers' activity so there is a record of performance and any issues that arise. The information on the Notes tab should reflect any information to be shared with other teammates and the Volunteer Coordinator

A Volunteer's Rights

A volunteer's rights are not so different from staff's rights. One of the key rights of a volunteer that parallels our customers and staff is the right to privacy.

According to CML staff policies, "access to a personnel file is generally restricted to the employee, employee's supervisor or hiring supervisor and Human Resources staff." The same holds true for volunteers. When a staff member who does not manage volunteers accesses volunteer information, it is a violation of their privacy. This includes all contact information, including emergency contacts, phone numbers, email addresses, etc.

There will be more information on your volunteer rights to come.

Our Rights and Responsibilities

<p>Volunteer Rights As a volunteer for Columbus Metropolitan Library, you have the right to:</p> <ol style="list-style-type: none"> 1. Receive appropriate orientation and training for the job. 2. Be informed about the organization and changes relating to your work. 3. Be seen as belonging and treated as a member of the team, not just free help. 4. Be acknowledged as an individual and supported in your role. 5. Be assigned to a job that is worthwhile and meaningful. 6. Have your suggestions heard and to receive feedback on your work. 7. Be safe on the job and comfortable with your work assignments. 8. Receive recognition for your service. 	<p>Volunteer Responsibilities As a volunteer for Columbus Metropolitan Library, you have a responsibility to:</p> <ol style="list-style-type: none"> 1. Adhere to all CML policies and procedures: Volunteer Agreement, Conduct Agreement and Confidentiality Agreement. 2. Be reliable, punctual and trustworthy. 3. Have a non-judgmental approach and the ability to work with a culturally diverse population. 4. Undertake training and participate fully. 5. Know your limits in regards to your assignment. 6. Notify your supervisor as early as possible if you are unable to work a scheduled shift. 7. Give notice if you cannot continue in your volunteer position or you are requesting a leave of absence. 8. Accept the right of CML to dismiss any volunteer.
<p>Columbus Metropolitan Library Rights The Library has the right to:</p> <ol style="list-style-type: none"> 1. Screen and interview all potential volunteers and to decline any volunteer. 2. Give instruction on how work is to be completed. 3. Expect volunteers to undertake training provided for them. 4. Plan on volunteers to complete accepted assignments. 5. Require volunteers to adhere to their job description and CML's Volunteer Conduct Agreement. 6. Evaluate a volunteer's performance. 7. Report problems and progress to Volunteer Services. 8. Be respected and trusted as a team member. 	<p>Columbus Metropolitan Library Responsibilities Each location has the responsibility to:</p> <ol style="list-style-type: none"> 1. Provide relevant CML policies and procedures: Volunteer Agreement, Conduct Agreement and Confidentiality Agreement. 2. Provide a personalized volunteer badge. 3. Provide an accurate job description. 4. Provide adequate time and training for each assignment. 5. Set and maintain standards and provide constructive feedback to volunteers. 6. Respect and trust volunteers. 7. Allocate supporting resources and provide volunteer recognition. 8. Dismiss a volunteer for policy violations.

Volunteer Services' Role

Volunteer Services:

- Manages the volunteer program for all of CML. They are the face of the library's volunteer program
- Advocates for staff, volunteers and the public, seeking qualified help, assists in recruiting, and making sure that volunteer support provided to the entire library is balanced and appropriate
- Provides tools to help you manage your volunteers
- Helps manage the risk involved in working with volunteers, working to eliminate potential lawsuits and unfavorable publicity
- Offers volunteer-related development opportunities for staff and volunteers
- Provides incentives to recognize your volunteers and work toward retention of good volunteers
- Supports you in the termination of ineffective volunteers
- Assists you in every aspect of your position as a Volunteer Coordinator

Things to Know About Working with Volunteer Services

- Don't accept candidates that won't be successful in your location. You are the best judge of what your location needs.
- Some volunteers who are not welcome to work with us are kept on file to avoid bringing them into the system over time. Information stored on the Notes tab tells the volunteer's story, so be sure add key material about the volunteer's performance here. Document volunteer behavior the same way you document security incidents, as these files are public records.
- When a candidate is unsuitable to work us, we will handle the situation. A volunteer may work better with another branch or another nonprofit.
- When your volunteer needs change, let us know. We track your needs and try to match you with the best candidates. The better informed we are, the better we can serve you.
- When you are uncertain or encounter anything outside of your expertise, let us know. We will either walk you through the process or help you handle the situation. If there might be legal issues involved, contact us immediately.

Recruiting

Recruiting is a daily process where you invite promising customers to consider joining us to support the library. Occasionally we attend special recruiting events hosted by outside organizations to match their community to the right nonprofit volunteer agency.

Who is the best people to attend these?

The event or opportunity addresses	Who attends the event
Volunteers living within your service area	Location support should attend to welcome your community to help the library. Volunteer Services will support you.
Volunteers living outside your service area	Volunteer Services attends to represent all locations. If the event is with your personal contact, please attend this event with us, as this gives us great context with the host organization.

Volunteer Fairs

- Volunteer Services coordinates these with input from coordinators in the service areas
- If it is a high school fair in just your service area, feel free to attend. If this is a college or university event, Volunteer Services participates with neighboring location staff.
- If it is a faith-based event, invite Volunteer Services to participate.

Dealing with schools

- Grade, middle, and high schools within your service area are yours to assist.
- Area colleges and universities are Volunteer Services' responsibility; do not sign off on any agreements or represent CML on your own. If you work with a college or university, get Volunteer Services involved.

Agreements with schools, social organizations or any outside entities

- Forward these to Volunteer Services. Only one person at CML is authorized to sign for the library: our Chief Financial Officer. Volunteer Services will secure all signatures for you.
- Forward anything of a legal nature to Volunteer Services for review by Finance or Human Resources.

Recruiting using any media, such as websites or newspapers

- Volunteer Services manages the process for you. You tell us what you need, and we will post a volunteer job for you, using a standard format and verbiage.
- Do not post your own positions online.
- Do not post volunteer positions in local newspapers. If approached to do this, talk with Volunteer Services or the Marketing and Communication Specialist.

Anything outside of this, call Volunteer Services.

College Placements

How college students are placed with us depends on the type of relationship we have with the group organizers or instructors. Groups like Buckeye Leaders with the Library have geographic restrictions where they serve communities in specific neighborhoods. Programs like Mount Leadership allow each member to find their own service organization and worksite.

Who Determines Student Placement	
Instructor – Education and Service Learning Courses and Clubs with Specific Geographic Requirements	The Students – Students Have the Option to Choose Placement from Several Nonprofits, Including Clubs Like Mount Leadership
<ol style="list-style-type: none"> 1. Instructor provides Volunteer Services with students' contact information. 2. Volunteer Services emails students the link to the application and the forms to be signed and returned to us. 3. Volunteer Services places the students depending on system-wide need and students' restrictions. Record will include "do not notify" instructions. 4. Do not notify the student until their background check is complete and they are ready to begin work. 	<ol style="list-style-type: none"> 1. The students complete the application and select the branches where they would like to work. The student may or may not identify themselves as a class participant. 2. Volunteer Services places the students depending on system-wide need and students' restrictions. 3. Interview the students and have them sign the appropriate paperwork.

Using the Volunteer Recruiting Bookmark

The Volunteer Recruiting bookmark is designed for Volunteer Coordinators and supervisors to use when recruiting potential volunteers. The bookmark shows the general opportunities we have available in the library.

Not everyone is involved in working with volunteers. To be sure potential volunteers receive precise information about their tasks and roles, only Volunteer Coordinators and supervisors should handle recruiting in the branch.

How to use the bookmark:

1. Do not have them out for general use. These are for coordinators and volunteer supervisors only
2. Check the list of volunteer assignments that interest the applicant. Feel free to cross out assignments that are not available at your location.
3. Use the Notes box for key information like your contact (email and extension)

Use the bookmark as a conversation guide about the work at your location. This discussion serves as coordinators and supervisors; first opportunity to screen the applicants and determine the best opportunity for the applicant.

Applications

Use the online Volunteer Application found on the volunteer page.

<https://www.columbuslibrary.org/volunteer/>

Does joining the library's team of volunteers sound like the job for you? If so, sign up below.



SIGN UP

The applications are available on the library's website:

1. For general use August through late April. One form for adults and teens. Social Security Number is a required field, but it is not needed for teen applications. Teens should enter their Social Security Number as 999-99-9999. These instructions are on the application.
2. The teen application for SRC use. This application is for summer VolunTeens only, and it is available from late April through July. For adults who want to volunteer at this time, the link to the application is in the Forms folder.

NOTE: Paper applications are not accepted. All applications are online.

Identifying a Volunteer for Your Location If you speak with a volunteer, and you want them to volunteer with you at your location, ask them to complete the application with your branch name in the last name field.

Ask the applicant to key in the Last Name field:

1. Their last name then
2. The name of your location.

When Volunteer Services sees this they will assign the volunteer to you immediately without reviewing the application.

Volunteer Placement

Assigning applications from the Volgistics mailbox is a constant process with new applications arriving every day. Please check your list of applicants at least twice each week.

Our goal is to keep everything in balance so that everyone has the support they need. As part of the placement process we take into consideration:

- The skills and transportation needs of the applicant
- The specific needs of each location, for example if a branch is looking for a very specific skill set, and we find an applicant to fit their needs we will contact the applicant and ask them to consider the location that needs them.
- The needs of the system overall. Locations with higher program attendance will get priority over locations with lesser need.

As Volunteer Services places applicants, we quickly review each application with the goal of making the best possible match between the potential volunteer and the library location.

If Volunteer Services notices that a location has not contacted an applicant within 30 days we report this inactivity to the Public Service Directors. We review the Notes tab in Volgistics to see what action has taken place.

NOTE: If volunteers haven't responded or have responded that they don't want to volunteer, let Volunteer Services know. Don't assume we remove

volunteers on a regular basis. Please send Volunteer Services an email to request applicants be removed from your list of potential volunteers.

Volgistics shows us duplicate applications, which helps us avoid:

- Impatient applicants who apply a second time before we provide a response to their initial application
- Volunteers who have been terminated or who did not pass a background check who want to attempt to come back to serve us again

Good customer service to applicants is when we provide prompt attention to either place them or notify them that we do not have work for them.

NOTE: If you find a volunteer is not a good fit for you, please notify Volunteer Services immediately.

Timeframes: Deadlines for Processing Volunteer Applications

When people offer to volunteer with us, they are giving us the gift of their time. To ensure that we show all potential volunteers respect, the process from submittal to placement should take no more than 30 days.

With volunteers apply the same principles of the Customer First in working with other library customers: it should reflect our values of respect, integrity and inspiration.

Application Timetable	
Task	Deadline
Initial contact from location – Acknowledge the application and schedule the interview with applicants that interest you	7-14 days
Face-to-face interview scheduled and completed	14-21 days
Onboarding complete; first volunteer shift scheduled	21-30 days

What to do when...

Contacting the applicant

When making multiple attempts to contact the applicant, use multiple media. If the first attempt is a phone call, the second attempt should be email. This is to

accommodate each volunteer's preferences and availability. According to college recruiting site, Handshake, it takes at least 3 attempts to contact students.

Track all attempts to contact the applicant on the Notes tab. Sample Notes include:

- 1/15 – left phone message
- 2/1 – sent email to schedule meeting
- 3/10 – talked with applicant's mother; he will call us back

If the applicant does not respond to your attempts to contact them within 30 days of the first contact, notify Volunteer Services to remove the applicant from your list.

Reports to PS Directors

Each month Volunteer Services reports CML's progress in volunteer placement to the PS Directors. They receive a monthly report showing which locations have outstanding volunteer applications that are older than 30 days.

The report shows which locations are meeting the onboarding deadlines and which are having issues meeting the requirements. The PS Directors will follow-up with the branch manager when deadlines are not met.

Screening Volunteers – The Interview

Screening volunteers is one of the most important aspects of your job as a volunteer supervisor. All volunteers must have a face-to-face interview with a volunteer supervisor before they can work with us. All potential volunteers are interviewed at the location level. Answer the following questions:

- Do you want this person to represent you and the library?
- Do they have the qualifications to assist you adequately?
- Do you feel comfortable leaving this person to work unattended?
- Do they have excellent literacy skills? If they do not, this may not be the place for them to volunteer.

The purpose of interviewing is two-fold:

1. Find out if the volunteer is a good match for your operation. Are they interested in what you're doing? Can they do what you need? Are they a good fit for your team?
2. Set the volunteer's expectations:
 - a. Let them know the minimum number of hours we accept is 15. That's 15 hours over the life of their service.
 - b. Explain that the work can be physically demanding and they must have advanced literacy skills to be successful.
 - c. Have them review and sign the appropriate paperwork. If they are going to have a problem upholding anything on any of these documents, now is the time to let you know.

NOTE: Even if the potential volunteer is a long-time customer that you know well, use the interview process to set the volunteer's expectations. If you want the volunteer to stay with you, use the interview process to make sure you're both on the same page. You may want to ask questions about their expectations. For example, if they're interested in the Homework Help Center but they want to provide one-on-one tutoring, this is not going to be a good fit.

Interviewing volunteers follows the same laws and regulations as interviewing staff. It is always illegal to ask interview questions or to discriminate in any way related to:

- Nationality
- Birthplace
- Ethnicity or race
- Religion
- Sexual orientation
- Marital status
- Health conditions and physical disabilities

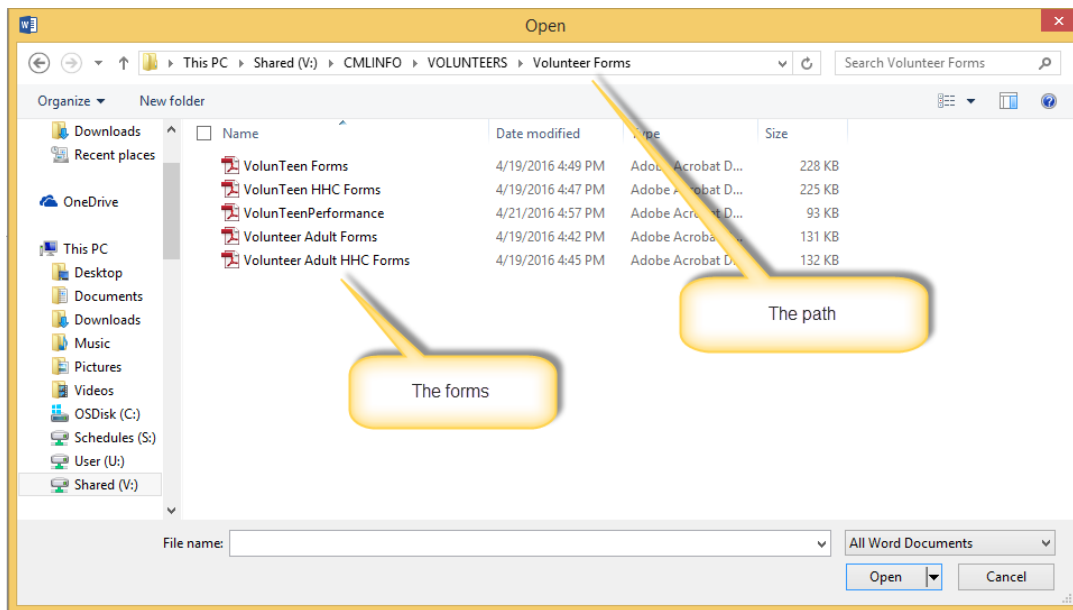
Develop a standard set of questions and use this for all volunteers. This allows you to compare one volunteer to the next. And if all the questions are standard, proper interview questions, it prevents the introduction of questions that could be construed as discriminatory. It's best to stick to your script.

Would you like to work with the applicant?	Next steps
Yes	Have the applicant sign the 3 forms <ol style="list-style-type: none"> 1. The Consent/Authorization and Agreements form or the Parent or Guardian Consent and Agreements form 2. The Confidentiality Agreement (2 times) 3. The appropriate Conduct Agreement (2 times) Scan the forms to volunteerservices@columbuslibrary.org We store the files in a centralized location.
No	Thank the applicant for their time and let them know we will get back with them. Let Volunteer Services know so we can send a "Thanks, but no thanks" message

Key reasons we would reject a volunteer:

- Poor literacy skills (can't alphabetize or read out loud)
- Poor language skills; not fluent in English (hinders their success with us)
- Poor interpersonal skills
- Poor hygiene
- Inappropriate attire

Looking for the forms? Here is the path to the PDFs:



These forms should be used only by Volunteer Coordinators and volunteer supervisors.

Review these forms with the potential volunteer so they know what to expect when they start. With the Confidentiality Agreement and the Conduct Agreement, one copy goes back to the volunteer and the second belongs in your files.

If the candidate is not a good fit, do not have them sign the forms. Thank them for their time. Ask Volunteer Services to send them a "thanks, but no thanks letter."

After your interview scan the signed documents and send them to Volunteer Services electronically. This is our cue to begin a background check. Please only scan one person's forms in each document, don't scan several different potential volunteer's paperwork and send them together.

NOTE: If Volunteer Services talks to a candidate first, it does not mean we endorse the volunteer.

If a volunteer reveals something to us that is not appropriate, we will instruct them not to share this information with you, e.g., criminal charges that do not prevent them from volunteering with us. We will inform the volunteer when their community service is within our guidelines, and we ask that they relay this information to you.

We will tell the volunteer to let you know that they have spoken to us.

As you talk to your potential volunteer and they give you signs (or you *know*) that this is not the volunteer job for them, give them an easy out. You can say something like, “I’m wondering if this is the right volunteer job for you.” If they agree, thank them for their time.

1. If the volunteer would be better suited to another area of the library:
 - a. If it is at your branch, see if you can bring the other volunteer supervisor(s) to participate in your interview
 - b. If it is at another branch, let Volunteer Services know and we will transfer the application to another location. Do not contact the other location. We may be privy to information that is not widely known.
2. If the volunteer is not suited to volunteer at the library, and you are not comfortable referring them to another nonprofit agency, contact Volunteer Services. We will recommend other nonprofits where the volunteer can help. If the candidate needs to complete service hours, you may suggest they contact their church or a neighborhood food pantry or free store.

NOTES:

- **If we do not have all the appropriate paperwork**, we will **not** activate a volunteer. Not having the signed forms complete presents a potential liability to the library. Never activate a volunteer record from the Applicant Status.
- Please scan the three documents in a single batch for each volunteer. We will then attach your 3-page scan directly to the volunteer’s record in our database.

Sample Volunteer Interview Questions

Behavior-based interview questions offer an effective means of screening as you ask volunteer about their experience rather than asking for a theoretical question where they make up an answer based on how they think they would react. By telling you what they've done in the past, you can better foresee how they will behave in the future.

Determine the right combination of questions for your site, and use this list of questions for every interview. Use these sample questions to develop the list that works for you.

- Tell me about a time when you dealt with pushy parents who want to focus on their child?
- Tell me about a time when you weren't sure how to proceed. How did you get unstuck? What did you do?
- Tell me about a time when you were helping someone and they decided not to take your advice or instruction. What was your reaction?
- Tell me about a time when you significantly impacted a child's life?
- Pick something you're good at and take 2-3 minutes to walk me through how to do that.
- Tell me about a time you coached someone through something.
- Share a time when you had to work with someone who was not as enthusiastic about, or committed to, the task at hand.
- Share a time you were working with a group that weren't all on the same page, at the same place, or at the same skill level.
- Give an example of a time when someone disagreed with you in a very direct manner? How did you react to this situation?
- Tell me about a time you completed a project on which you worked alone for long periods of time.
- Tell me about a time you had to direct another adult.
- Tell me about a time when you were surprised or frustrated with a coworker. What did you do?
- Tell me about a time you had too much to do. How did you cope?
- Give me an example of a time in which you needed to redirect/engage a child or teen who seemed unmotivated or distracted?
- Tell me about a time you were tasked with something you were unfamiliar with and how did you handle/move forward with it?
- Tell me about a time when you were working on a project and were deeply engrossed in it. What happens when a member of your team comes up to you and tells you that priorities have changed, and you need to change to another task immediately. How does it make you feel? How do you feel; about shifting gears and starting on something else?

After the Interview

You've said yes to a volunteer, but here are additional things to consider:

Situation	What to Do
After explaining what the job entails the volunteer appears to still be interested, but you have a gut feeling that the volunteer is no longer interested	Have them sign the forms, but set them aside for a day or two, then call the applicant. <ul style="list-style-type: none"> • If you're still interested in applicant, ask them if they're still interested in volunteering. Don't push them. Give them an out. • If you're no longer interested in their support, ask them to consider another volunteer option. This can be another library location or a different organization. If another organization, Volunteer Services can help.
It's been 30 days since an applicant contacted you	Sounds like the applicant lost interest in volunteering! Notify Volunteer Services, and we will delete the application. If they come back later, they can complete a new application.
Any action taken in the application process	Use the Notes tab to track all activity on an applicant's record. That way you will always know the next steps to be taken.
It's been 30 days since you talked to an active volunteer	<ul style="list-style-type: none"> • Contact the volunteer to see if they have stopped volunteering • Unless the volunteer works with you on an irregular schedule, notify Volunteer Services to change their status to Inactive and archive the volunteer. If they come back to you, we can unarchive them quickly.

Volgistics is not storage for future volunteers. If you cannot place a volunteer within 30 days, let Volunteer Services know so we can move the application to another location or notify them that we cannot place them.

Background Checks

In Ohio, anyone working with children is required to have a current background check on file. Human Resources requires this of all staff and all volunteers.

Key information on background checks, such as Social Security Numbers is collected by our background check company.

1. After interviewing a candidate and having them sign the required documents notify the candidate that Verified First be sending them an email to collect key information, like their Social Security Number
2. Send Volunteer Services all the required signed documents so they know to start the background check process. All required documents must be in place before the background check is run.
3. The background check company contacts the candidate to start the process. If the candidate does not reply, they cannot volunteer with us.
4. The background check company then notifies Volunteer Services with the results of the check.
 - a. If the results are positive, Volunteer Services sends a welcome message to the volunteer and cc's either the coordinator or supervisor so you know to schedule the volunteer. If the volunteer opts to receive a notice from the background check company, they will receive it.
 - b. If the results are negative, and an Adverse Action notice is sent to the volunteer to give them an opportunity to contest the background check. If there is no challenge, the applicant's record is placed in our archive with a DO NOT PLACE notice so we do not accept the candidate at a later date.

NOTE: If your applicant does not have a Social Security Number instruct them complete that field on the electronic form as all 1s (111-11-1111).

About the background checks:

1. Under normal circumstances it takes between 3 and 5 days to be processed. An applicant has up to 7 days to reply to Verified First before they stop notifying the candidate. Occasionally a background check takes longer if a record is discovered. After noticing a check is taking longer than normal, notify Volunteer Services to get a status right away.
2. Because of the cost of an average background check, we ask all volunteers to provide a minimum of 15 hours of service. Interviews are used to screen out volunteers who may not want to complete the 15 hours of service, so be sure to ask if this is OK with your applicant.
3. We do not accept background checks from other organizations.

4. If we find an unacceptable criminal record, Volunteer Services orders an Adverse Action series of letters to be sent to the applicant. The background company notifies the applicant. We will let you know that they will not be working with you, but we do not share the reason.
5. If a volunteer returns to you with a gap of service:

Length of Gap	What We Need to Do
Less than 12 months	Change the volunteer's status from Inactive to Active. If the record has been archived, ask Volunteer Services to reactivate the volunteer's file.
More than 12 months	<ul style="list-style-type: none"> A. Have the volunteer sign all 3 forms and scan them to Volunteer Services. B. Volunteer Services will run a new background check and restore the archived file C. On the volunteer's first day, review their contact information (street address, phone and email) and make the necessary updates in Volgistics.

NOTE: If a teen returns to work with you and has a significant change in duties, have them sign all the forms. Teens should have their parents re-sign the Parental Permission form as well.

6. If you are not sure of the gap in service, contact Volunteer Services, and we will look up the length of absence in our database.

The notice the volunteer receives about completing information from Verified First looks like this:

 Sent: Wednesday, August 4, 2021, 07:37:04 PM EDT
 Subject: Columbus Metropolitan Library Background Questionnaire Notification



Background Questionnaire Notification

Hello, ZACHARY HAMNER!

As part of your consideration for for volunteer work, you will need to complete the electronic consent and authorization, and sign any digital form(s) found at the link below.

[CLICK HERE TO BEGIN](#)

Or copy paste into browser: <https://verifiedfir.slk5rD>

The background questionnaire takes approximately 15 minutes to complete and we recommend that you double check the information you provide for accuracy to make sure there is no delay in processing your background investigation.

To remain in active consideration for for volunteer work, you must complete the electronic consent and authorization, and digitally sign the required form(s) within 7 day(s).

Sincerely,
 Sue Wolford
swolford@columbuslibrary.org
 Columbus Metropolitan Library
 6148491055

[Refuse the Background Check](#)
[Stop Receiving Reminders on this File](#)

When we do not run background checks:

1. For teens 17 and younger
2. For large groups affiliated with an organization or school performing project-based work where a staff member will be with the group at all times. These volunteers will not interact with our customers without a staff member present. This includes corporate groups and groups from universities, such as OSU and Otterbein.

Family Members Volunteering with Us

If Staff Member Works in:	Family Members Can Volunteer in:
Circulation/Customer Service	Youth Services, HHC, Reading Buddies or Life Skills
Youth Services	Circulation/Customer Service, HHC or Life Skills
Homework Help Center	Circulation/Customer Service, Reading Buddies, or Life skills

Family members may not work in the same area as their relatives.

CML relatives will not be considered for the Community Intern program. This would be a violation of the library's nepotism policy.

Staff Returning as Volunteers

When the employment relationship is terminated with an employee, they may return to volunteer with us provided:

1. Their relationship with the library was not the result of an involuntary termination. If an employee was fired, they may not participate in the volunteer program.
2. Any staff member who is part of a leadership team may not return to their branch to participate in their old program for a period of 1 year (12 months).
 - a. Branch managers or Circulation or Youth Services managers or supervisors may not return to volunteer at their branch. They may help at another location.
 - b. Homework Help Specialists or Reading Buddies coordinators may not help in the Homework Help Center or Reading Buddies program at their branch. They may help in the program at a different location.

Service Dogs as Reading Buddies Volunteers

When someone wants to volunteer with their service dog in the Reading Buddies or other volunteer program:

1. Determine if the dog is registered with Pet Partners or Therapy Dogs International. The dog must be registered with either of these groups to be accepted. No other therapy dog groups will be accepted.
2. The volunteer must be processed like all other volunteers (background check and required forms) and
3. The dog owner must sign the *Pet Owner Acknowledgement of Responsibility and Liability Waiver Agreement* and
4. They must provide us with a copy of current:
 - a. Registration with the CML recognized animal organization
 - b. Proof of dog or cat license (other animals are not licensed)

Note: All documentation will be tracked in Volgistics and the volunteer will be notified when they need to provide us with renewal documentation.

Send copies of all documentation, including updated versions, to Volunteer Services.

Once all the documentation is in place and the owner's background check is complete, the dog may begin to volunteer with us.

Court Ordered Volunteers

As a result of H.B. 56, the Fair Hiring Act, screening for court ordered service occurs at the end of the placement process. When someone approaches us and announces that they need to perform court ordered volunteer work, we are forbidden to ask any questions related to their court case. Refer this person to Volunteer Services.

Anyone with court-ordered community service will be treated like any other applicant. They will be:

1. Screened for an appropriate level of skill and knowledge and
2. Subject to a face-to-face interview with their potential supervisor.

NEVER ask the candidate why they need to perform court ordered service.

Just for your information we do not accept volunteers who committed the following crimes:

1. Any kind of theft
2. Assault
3. Arson
4. Concealed carry
5. Crimes of a sexual nature
6. Any type of felony

Practicum Students

All practicum and college interns serve as volunteers in a structured program. Their service serves two needs:

1. They gain professional experience that will launch their career and
2. They provide service at a near professional level

These students enter their application and track their time in Volgistics like all other volunteers. Many of these programs require completed timesheets. Students who get into the habit of using Volgistics to track time will find it easier to use this data to complete timesheets.

Evaluations are part of the practicum and internship process. Plan on completing this paperwork in exchange for the student's assistance. Please provide input that is valuable to the student's continued professional development. Your input offers faculty members with feedback for use in evaluating the student's performance.

If a student approaches you directly for a practicum or internship, direct them to apply to work with you by keying you branch's name in the Last Name field on the application.

Group Projects

When approached for a group project, please send the requester to Volunteer Services. We manage group volunteering using a centralized approach, so all groups come through one point of contact. Groups seeking projects can include:

1. College and universities who are providing community service
2. Corporate groups who are looking for a team building exercise
3. Volunteer organizations who provide teams to nonprofits for project-based work

Note that groups approach us for a number of reasons.

- Some are community partners, who donate to CML, so we need keep the Development department notified of their involvement
- Universities offer service days for multiple locations, so Volunteer Services coordinators and reports this. We complete the registration process with the schools.

Otterbein – Plunge	Ohio State Service Days
Welcome back (fall)	Welcome back (fall)
Winter	Martin Luther King Day
Spring	

- United Way – Columbus Volunteer Challenge. The planning starts in June or July with the event taking place in September.

Group records are used to track group projects. Each volunteer on the team does not complete an application, so they have not had background checks. Because there are no background checks,

- No member of the group may interact with the public, and
- A staff member must be present at all times.

When managing the group project:

1. Provide the group with an overview of the library and your branch. Make sure each team member has the opportunity to get a library card, if they want one.
2. Have each team member sign a photo release, then take pictures that we can share on the volunteer Facebook page or with the organization providing the volunteers.
3. The group may provide shelving support so long as they understand that customers with questions will be referred to staff.
4. Because a staff person must be present at all times, if the CML staff supervising needs to go to the staff room or take a break, another staff member must take the supervisor's place. Never leave the group unattended.
5. Track their time in Volgistics as a group. On the Service tab enter the length of the service project and the number of volunteers involved. Volgistics will calculate the service hours. If you do not have access for a Group record for your organization, contact Volunteer Services.
6. Take photos of the volunteers in action and prepare a brief write-up of the project. Forward this to Volunteer Services to be include on the volunteer Facebook page.

NOTE: If the photo includes someone who is not a regular volunteer, photo releases are required from everyone in the photo. See My CML, Staff Forms for the Photo_Video_Release.

Group projects can include outdoor work, such as cleaning up a parking lot or completing a project that has been approved by Property Management. Indoor projects can include any special work to be done by a team or routine assistance that would assist your location.

Notifying Volunteers They are Ready to Start

When the background check is completed, Volunteer Services sends the volunteer a message notifying them that the application processing phase is complete. After we send this message, please schedule the volunteer for their orientation and first volunteer session

This message welcomes new volunteers, but it introduces them to our Customer First philosophy. The link to the Customer First video is embedded in the email.

We are pleased to welcome you to the Columbus Metropolitan Library volunteer family. Your background check is complete, and you are ready to get started.

To give you a sense of what's important to the library, take a look at CML's Customer First philosophy. [As this video shows](#), we put the customer first.

Whether you are helping as a Reading Buddy or a Homework Help Volunteer, assisting with Life Skills, or another library task, we are counting on you.

Expect to hear from your supervisor about a starting date soon.

Have questions? We are here for you.

The teen version of this email is:

We are pleased to welcome you to the Columbus Metropolitan Library volunteer family. The paperwork is complete, and your parent or guardian gave us permission to work together, so we are ready to get started.

To give you a sense of what's important to the library, take a look at CML's Customer First philosophy. [As this video shows](#), we put the customer first.

Whether you are helping as a Reading Buddy or a Homework Help Volunteer, assisting with Life Skills, or another library task, we are counting on you.

Expect to hear from your supervisor about a starting date soon.

Have questions? We are here for you.

After receiving this email, the majority of a volunteer's communication will now be with the location where they work.

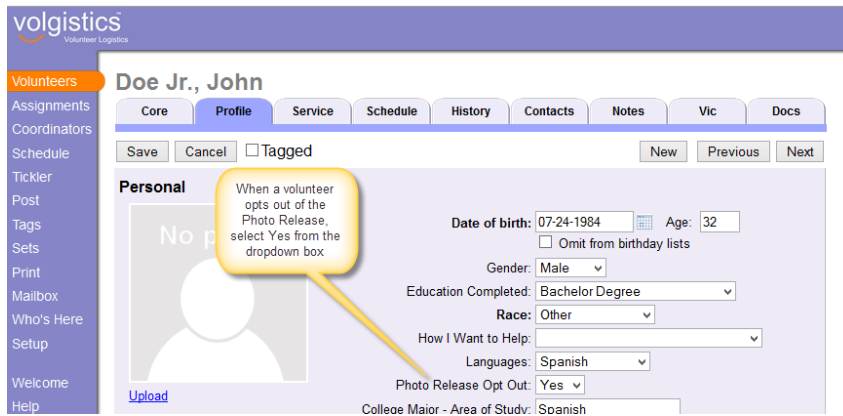
Onboarding New Applicants

1. Provide an overview of the branch, including where the volunteer will store personal items while volunteering
2. Check that the volunteer has viewed the Welcome to the Library video
3. Provide an overview of the tasks the volunteer will be performing
4. Introduce the volunteer to key staff and fellow volunteers

Onboarding Exceptions

1. Any volunteer can opt out of the **photo release** by striking out that statement on the Volunteer Confidentiality and General Agreements form or signing the portion of the Parent or Guardian Consent and Agreements related to non-consent.

When someone opts out of the photo release, document this in Volgistics on the Profile tab. At the Photo Release Opt Out button, click the drop down box and select Yes.



The screenshot shows the Volgistics interface for a volunteer's profile. The user is John Doe Jr. The 'Profile' tab is selected. A callout box points to the 'Photo Release Opt Out' dropdown menu, which is currently set to 'Yes'. The form includes fields for Date of birth (07-24-1984), Age (32), Gender (Male), Education Completed (Bachelor Degree), Race (Other), How I Want to Help, Languages (Spanish), and College Major - Area of Study (Spanish). The 'Photo Release Opt Out' field is highlighted with a yellow callout box containing the text: "When a volunteer opts out of the Photo Release, select Yes from the dropdown box".

Prior to taking any photos in the branch, make sure that your volunteers have consented to have their pictures taken. If a volunteer has not agreed to the consent, remove them from the picture taking area.

Welcome Your Volunteer Teammates: Orientation

You've selected your volunteers, now it's time to welcome them to become part of the team. Before training your volunteers, make sure they feel comfortable with their surroundings.

1. An overview of CML
2. A tour of the facility where they will be working
3. An introduction to staff, especially the leaders
4. Take their picture for your team
5. Show them where in the staff area they can store their personal items while they're on duty
6. A review of volunteer documents
7. What they need to know to do their jobs

The Overview of CML

Every volunteer should be aware

- CML is a network of 23 locations
- We are part of the CLC consortium that shares material with other library systems
- Of who our Chief Executive Officer is
- Of what we do: our programs and other volunteer roles

Facility Tour

- Show volunteers the break and rest rooms. Show them where they will store their personal belongings in the staff area while on duty.
- If they use a security badge, explain how it is shared and must be left at the branch when they leave. If they do not use a security badge during their shift, please explain how and the circumstances that they can access the staff area.
- Show them their work area.

Introduction to Staff, Especially the Leaders

Take the time to introduce volunteers to staff, especially to supervisors, managers and security officers so they know who to reach out to should they need help when you are not available. It's important that volunteers know they are part of a team.

Personal Items and Where to Store Them in Your Staff Area

When touring the staff area, show the volunteer where they can stow their personal items.

There are two reasons that you want to provide storage space for volunteers' personal items:

1. It's a sign of respect to provide a safe storage area for purses, planners and electronics
2. We don't want volunteers using personal electronics while they're on duty. If a volunteer is helping in the HHC or with a Reading Buddies program, we don't want them to be interrupted by text messages or phone calls. For SRC teens, we want them engaging with our customers, not using their cell phones.

Take the Volunteer's Picture

Make volunteers feel like they're part of the team by posting their pictures to your staff or volunteer space. This way staff will get to know the volunteers and their names so they can welcome them and thank them at the end of their shifts.

Pictures can also be uploaded to Volgistics as one more way to help staff recognize and thank volunteers. See the information on Volgistics and the Profile tab to see how to upload the volunteer's picture.

Review of Volunteer Documents

On a volunteer's first day review the documents that they signed during their interview with you. This is your chance to emphasize the rules that are particularly important to your location. These forms include:

- The Confidentiality Agreement – make sure the volunteer understands why this is important and their role in the confidentiality process.
- A Volunteer Conduct Agreement – make sure the volunteer knows the rules. Review this line by line and talk about what of these rules are especially important at your location.

Outside of the volunteer-specific policies, all volunteers follow staff policies except when taking action with customers. Volunteers report issues to staff; they do not act upon these. Please make this clear to your volunteers.

Please share information about the **Inclement Weather Hotline** (614-479-3602) with your volunteers. Volunteers can also check the Columbus Metropolitan Library Facebook page and the major local television stations to find out if we are closed.

Volunteer Training

Major volunteer roles have training materials designed to standardize the volunteer training process. Training materials are available for:

- Homework Help volunteers
- Reading Buddies
- Circulation support

To train a volunteer whose work is outside of these tasks, consider having them work in tandem with staff or another trust volunteer until the new volunteer has mastered their work.

Training must be provided to volunteers so they have the tools needed to perform their job well. Factors to consider when training volunteers:

- Experience
- Maturity level
- Attention span
- How often they will volunteer each week or month
- Length of time the volunteer will be with you

If a volunteer has worked at another branch they may catch on quickly, especially if the tasks are the same.

Volunteers Working with You

Once volunteers begin to work with you some key issues to remember

1. Insurance prohibits us from transporting volunteers unless this is a key part of their volunteer position and is written into their job description. For example, if an intern is working with the Property Management team who work at multiple locations it is OK for the volunteer to ride with CML employees. These positions are rare.
2. If a volunteer is helping at a special event and travel is not part of their job, they must arrange for their own transportation to the event. They may not ride with library staff.

Travel time is not included in a volunteer's time with us unless transportation is part of their assignment. Volunteers should log out before leaving, then log back in when they reach their destination.

Recognizing Volunteers Every Day

Volunteer Space – Every location provides space for volunteers to:

1. Store personal items (hats, coats) and their lunch/dinner/snack if applicable.
2. Be recognized as part of the team. Be creative! This could include a bulletin board with volunteer's picture with their names. This will help staff greet and thank volunteers as they work with your team. Other ideas on identifying and casual recognition of volunteers is up to you.

Say Thank You

When a volunteer works with us, they give us a gift of their time and knowledge. Take a moment to thank your volunteers each time they work with you. Please show that you appreciate their support.

Volunteer Badges

Every volunteer wears a volunteer badge while on duty. This badge shows both the program they are supporting and the volunteer's name.

Using the correct template, print the badges on Avery 5392 Nametag forms (3" x4"). Contact Volunteer Services for the badge holders and elastic lanyards.

The available templates on MyCML include:

- VolunTeens
- Homework Help and
- Reading Buddies

The backs of these nametags may be a good place to write each volunteer's PIN.

Security badges are not available for volunteers unless they are a long-term intern. You may request a badge with the volunteer's name from Security.

When a volunteer requests that their pronouns be included, please add them to the space below the volunteer's name. Do not include these unless requested.

Recognizing our Volunteers: Volunteer Awards and Gifts

We recognize volunteers four ways:

1. Awards based on the number of hours they work each year
2. Location awards based on performance and
3. Awards for length of service (in 5-year increments)
4. With an annual gift distributed to all active volunteers during the winter holiday season

Annual Awards

Each year we hold an annual Volunteer Celebration honoring all of our volunteers. All volunteer supervisors are invited to attend. We expect to see at least one representative from each location in attendance to show support for your volunteers. Your invitation/notification and information about the event will arrive via:

- Email and
- During the Volunteer Coordinator meetings.

Your volunteers receive mailed invitations and reminders through Volgistics.

The Volunteer Celebration recognizes active volunteers who worked 50 hours or more in the previous calendar year (January 1 through December 31). To qualify for an award, the volunteer must:

1. Be an active volunteer at year's end and
2. Work the minimum number of hours for the award.

Award	Qualification	Award Includes
CML-Specific Awards		
Director	50 to 99 hours	Annual star pin and certificate
Reading Buddies Award	30 or more hours	Annual star pin and certificate
Presidential Service – Teens (12 to 15 as of December 31)		
Presidential Service Award – Bronze	50 – 74 hours	Pin, personalized certificate and letter from the president
Presidential Service Award – Silver	75 – 99 hours	Pin, personalized certificate and letter from the president
Presidential Service Award – Gold	100 and more hours	Pin, personalized certificate and letter from the president

Presidential Service – Young Adults (16 to 25 as of December 31)		
Presidential Service Award – Bronze	100 – 174 hours	Pin, personalized certificate and letter from the president
Presidential Service Award – Silver	175 - 249 hours	Pin, personalized certificate and letter from the president
Presidential Service Award – Gold	250 and more hours	Pin, personalized certificate and letter from the president
Presidential Service – Adults (26 and older as of December 31)		
Presidential Service Award – Bronze	100 – 249 hours	Pin, personalized certificate and letter from the president
Presidential Service Award – Silver	250 – 499 hours	Pin, personalized certificate and letter from the president
Presidential Service Award – Gold	500 and more hours	Pin, personalized certificate and letter from the president

Invitations to the Volunteer Celebration are sent to all active volunteers (volunteers who worked in the three months prior to the mailing).

NOTE: VolunTeen Summer Reading Club hours are recognized through SRC, so they are not included in this program. When considering a year-round teen for these awards, hours spent strictly supporting the SRC program are deducted from the year-end total hours. This is so volunteers are not recognized for the same work twice.





According to the rules governing the Presidential Service Award only U.S. Citizens can receive these awards. We will provide an alternative awards to non-citizens who have earned this honor.

Location Awards

Each location has the option to award their outstanding volunteer one of four performance-based volunteer awards.

Because these pins are to recognize special achievement, please do not award more than one or two in each category per award program.

These awards include:

Award	Pin	Description
Customer Caregiver - for outstanding, consistent customer service	Pineapple, a traditional symbol of welcome 	Shares their broad knowledge of the site with the customers. Instinctively knows when to assist customers. Knows when and what to help customers with and when to refer to staff.
Illuminator – for enlightening work, especially in the area of education	Light bulb 	Lights the way for others to follow -leading by example. Opens the door of knowledge to children and adults, by regularly encouraging reading and learning.
Shining Star – for extraordinary, insightful assistance	Man holding a star 	Detailed oriented, motivated, and organized. Takes initiative, follows directions well, and requires little supervision.
Team Worker – for being an integral part of a site team	Team of people, standing shoulder to shoulder 	Works well with staff and will assist with any task. Works as an integral part of the site team to help increase the efficiency of the entire operation.

Annual Volunteer Gifts

Close to the end of the year, sometime between Thanksgiving and the end of year, Volunteer Services send each location volunteer gifts based on the number of active volunteers in Volgistics. Please distribute these to your volunteers as soon as they are received.

Because service recognition should be the same from location to location, allow Volunteer Services to provide you with any volunteer gifts. Along with the annual gift at the end of the year, we have additional gift items from previous years that can be used as spot awards or to thank exceptional volunteers. Please contact Volunteer Services if you would like additional gift items.

Medical Emergencies

Should a volunteer get hurt while working with you, we have are two courses of action:

1. Major emergencies are when a volunteer is incapacitated or the injury cannot be addressed with the supplies in a standard emergency kit. In this situation, call 911 immediately and let the medical experts take full responsibility for the situation.
2. Minor emergencies are when a volunteer gets hurt and the situation can be addressed by using supplies in your location's emergency kit.
 - A. Adult volunteers can determine if they are capable of completing their shifts.
 - B. For teen volunteers, use the Contact tab to find an emergency contact and ask that the contact to provide the teen with a ride home. If this is not possible, have the VolunTeen sit out the rest of their shift until it is time to return home.

Note: When possible, provide the medical professionals with contact information from the Emergency Contact information on the Contact tab in Volgistics. In major emergencies, EMS personnel reach out to the volunteer's emergency contacts. CML staff **does not** take this action.

During SRC use the information on the Parental Consent forms until Volunteer Services notifies you that the Volgistics contacts have been updated.

Document all injury occurrences with a Security Incident Report.

Using Volgistics – The Volunteer Record

Logging into Volgistics

Each location has one login for Volgistics. The Volunteer Coordinator determines who should be the key Volgistics contact for their site.

The screenshot shows the Volgistics website interface. The top navigation bar includes links for Home, About Us, and Contact Us, along with social media icons for Facebook, Twitter, RSS, and YouTube. Below this is a secondary navigation bar with links for Tour, Clients, Try or Buy, Support, Blog, and a prominent Login button. The main content area features several yellow callout boxes:

- About Us:** Contact Us
- Try or Buy:** Try it for 30 days or create a FULL account today!
- Video Tutorials:** Learn how to make the most of Volgistics with these video tutorials.
- Sample Account:** Take Volgistics for a test drive with a demo account, pre-loaded with sample data.

The central focus is the **Secure Login** form, which contains the following fields and options:

- Account number:** 387340295 (Callout: Our account number)
- Email address:** kgilbert@columbuslibrary.org (Callout: The email of your location's key Volgistics expert)
- Password:** [Redacted] (Callout: Your location's password)
- Links: [Forget your password?](#) [Help](#)
- Checkbox: Remember my credentials at this computer
- Button: **Login** (Callout: Only one person can be logged into Volgistics at a time)

Below the login form, there are informational sections:

- Are you a volunteer?** Volunteers do not login at this location. Organizations usually place a link to the volunteer login on their website. Contact the organization where you volunteer if you cannot find this link. [Learn more here.](#)
- Don't have an account?** You can sign up for a free 30 day trial, and start organizing your volunteer records today. There's nothing to install or buy! [Sign up here.](#)
- Link: [Bookmark this page](#)

At the bottom right, there is a **Blog** button and a **Follow us:** section with social media icons for Facebook, Twitter, and YouTube. A text box next to the blog button states: "phases 3 & 4 of the new VicDocs feature have been released. You can now upload document files to records in your account. Please see our blog for [more information](#)."

Login Fields	What to Key
Account number	387340295
Email address	Email for key Volgistics user at the location
Password	Determined by the location's key user

Only one person can be logged into Volgistics at a time.

The Welcome Screen

The screenshot shows the 'Welcome' page for a Volunteer Coordinator. The page includes a sidebar menu with options like 'Volunteers', 'Welcome', 'Help', and 'Exit'. The main content area displays account statistics, a 'Birthdays' table for the current week, and a 'Security Update Announcement' regarding TLS 1.0 and 1.1. Callouts provide additional context: 'Welcome Volunteer Coordinator, displays your location's Volunteer Coordinator's name' points to the header; 'Select the Volunteers menu option to get started' points to the sidebar; 'Weekly birthdays for your location. If this doesn't display, none of your volunteers are celebrating birthdays...' points to the birthday table; 'Security Updates display here from Volgistics, when needed' points to the security announcement; and 'Tips on how to use Volgistics appear here each week' points to the 'Tip of the Week' section.

To get started, click Volunteers, the first option on the menu to the right of screen.

The Volunteers Screen

This is where to select the volunteer records to view and revise.

The screenshot shows the 'Volunteers' management screen. It features a sidebar menu with options like 'Volunteers', 'Assignments', 'Schedule', 'Tickler', 'Post', 'Tags', 'Sets', 'Mailbox', and 'Who's Here'. The main content area includes a search bar with a dropdown menu for letters (A-Z) and an 'All' option. Below the search bar are several filter dropdowns for 'Status', 'Type', 'Flags', 'Set', 'Tags', and 'Kind'. A 'Clear' button is located below these filters. The 'Find' section contains input fields for 'Last Name', 'First Name', 'Number', 'Email', and 'Group Name', each with a 'Go' button. Callouts explain: 'After selecting your options, click All' points to the 'All' dropdown; 'Select a letter to see all the volunteers whose last name begins with that letter.' points to the letter dropdown; and 'Advanced options' points to the filter dropdowns.

The Volunteers screen allows you to select the volunteer records you wish to see. These filters include:

Filter	When You Use It – Select the Drop Down Option
Status	<ul style="list-style-type: none"> • Active - vetted volunteers who are ready to work • Applicant – volunteers waiting to be brought onboard • DO NOT PLACE – terminated volunteers who are not welcome to return • Inactive – volunteers who are no longer volunteering (30 to 60 days) • Review Notes – volunteers with complete service who may not have the best track records (info on Notes tab) • Waitlist – SRC only, teens waiting for an opportunity
Types	List of most common volunteer jobs. This allows you to see all your volunteers whose most common assignment matches this. Volunteers who perform multiple tasks will only have one Type.
Flags	Flags show the volunteers' affiliations. Each volunteer may have many flags. These are used for reporting or grouping purposes. Do not remove Flags set by Volunteer Services.
Set	Established reporting groups for volunteers. Not commonly used.
Tags	Tags are used to set up a temporary group of volunteers, most commonly for email communication of select volunteers. Tags will stay on the record until the session times out or you log out.
Kind	Options include, Any, Individuals or Groups

The Advanced options button allows more detail in selecting records. This is where the checkbox for archived records appears.

The Find options allow you to look for specific records by keying in the information you seek. Then click either All (on the alpha line) or Go on the same line.

NOTE: Click All without selecting any options to view the volunteers at your location.

The Core Tab

The Core tab shows key information about each volunteer including:

- The PIN
- The volunteer's role and
- Contact information

The screenshot displays the 'Core' tab for a volunteer named John Doe Jr. The interface includes a sidebar with navigation options such as 'Volunteers', 'Assignments', 'Schedule', 'Tags', 'Mailbox', 'Who's Here', 'Welcome', 'Help', and 'Exit'. The main content area shows the volunteer's profile with the following fields and callouts:

- Contact Name:** Last name: Doe Jr., Number: 778870, Status: Applicant, Type: Reading Buddies, Kind: Individual (selected), Group (selected).
- Group:** Group name: 4/27 - Parsons - Reading Buddies, Members: 0, Participation: The same volunteers each time (selected).

Callouts provide additional information:

- The status shows where the volunteer is in the process.
- The PIN (778870).
- The Type is the volunteer's main assignment.
- The Group note shows date assigned, Site and Type.

On the **Core** tab

In the Name section:

- The left column shows information completed by the volunteer
- The right column shows information completed by Volgistics or Volunteer Services.
 - The **Number** is the volunteer’s PIN they use to log in and out to track their time
 - The **Status** options include:

Status Option	What it Means
Applicant	A potential volunteer
Active	Currently cleared to volunteer. Note: Volunteer Services switches Applicants to Active when the screening process is complete
DO NOT PLACE	Volunteer poses a threat to the library and is no longer allowed to volunteer. Notify Volunteer Services immediately.
Inactive	The volunteer stopped their service. Switch the status from Active to Inactive, then notify Volunteer Service to archive the record.
Review Notes	The volunteer is inactive and displayed questionable behavior during their service. Document all questionable behavior on the Notes tab for future reference should the volunteer opt to return.
Waitlist	For applicants who would like to serve at a branch when a position becomes available. SRC only.

The Group section:

- CML uses this mainly for applicant information, but can be used for special notes on the volunteer’s status with us. The note in the group field includes:
 - The date submitted
 - The location assigned to the volunteer and
 - The key job to be performed by the volunteer

Note: Additional information can be added to the Group field, but the above items should not be removed until the applicant is Active.

This field is designed for groups of people volunteering together, like OSU’s Pay it Forward or Otterbein’s Plunge volunteer groups.

Further down the Core tab screen are the final four sections.

- **Address**, which displays the volunteer’s contact information

Note: For the Library Card field be added to the application we modified a Phone field. On the application it appears to the applicants as “Library Card Phone.” This field is for a library card number.

- **Flags** are fields that allow us to group volunteers for reporting. Key flags include:

Flags	What it Means
1 Young Adult 16-25 Award 2 Young Teen 12-15 Award	Categories for Presidential Service Awards based on the person’s age as of December 31 of the current year
Any college or high school	For schools where we report hours to teachers or professors. This also allows us to show impact of students’ service time
VIP	A major donor who volunteers
Teen	Volunteers 12-17 as of December 31
Returning SRC	Experienced teens with us for the 2 nd or 3 rd year
Corporations	Current employees of corporations that may provide incentives for volunteering or work with corporations that are major CML donors

The screenshot shows a volunteer profile form with the following sections:

- Address:** Includes fields for Address 1 (96 South Grant Avenue), Apartment/Suite/2nd Address (Apt 3), City (Columbus), State (OH), Zip (43215), Primary phone ((614) 645-2275), Secondary phone, Work phone, Text phone ((614) 975-7843), and Library Card (1234567890). There are checkboxes for "No postal mail", "No email", and "No text message".
- Flags:** A dropdown menu for selecting flags and a "Save" button.
- Sites:** A list of sites, with "Parsons Branch" visible. A callout points to this section stating "List of all Sites a volunteer works".
- Statistics:** A summary of the volunteer's service, including "Hours: 123.32", "Life: 5.50", "YTD: 5.50", "MTD: 5.50", "Years of service: 1 years, 4 months", and "Date of last activity: 04-04-2016".

Buttons at the bottom include "Save", "Cancel", "Previous", and "Next".

Notify Volunteer Services if a Flag needs to be modified or added. DO NOT remove a Flag.

If a Flag would be useful in creating a special groups for your volunteer, notify Volunteer Services.

- **Sites** shows where the volunteer works. You can only see the volunteers who help at your location.
- **Statistics** shows a quick view of the volunteer's service hours. For more detail, see the Service tab. This is a quick look up for teens who need their service hours documented.

The Profile Tab

The Profile tab information displays valuable information for placing volunteers. This is where volunteers tell us about:

- Their education
- How they want us to communicate with them
- Their preferences regarding schedule and locations
- Who they want to work with and
- For SRC teens, their grade

The screenshot shows a web form for a volunteer profile. The form is titled "Doe Jr., John (4/27 - Loading Buddies)". It has tabs for "Core", "Profile", "Service", "Contacts", "Notes", and "Vic". The "Profile" tab is selected. Below the tabs are buttons for "Save", "Cancel", and a "Tagged" checkbox. The form is divided into a "Personal" section on the left and a "Details" section on the right. The "Personal" section includes a photo of a young man with glasses and buttons for "Upload" and "Clear". The "Details" section includes fields for "Date of birth" (07-24-1984), "Age" (31), "Gender" (Male), "Education Completed" (Bachelor Degree), "Race" (Other), "How I Want to Help" (dropdown), "Languages" (Spanish), "College Major - Area of Study" (Spanish), "Current School (if applicable)", "College(s)" (OSU, BA), "Other Skills (Please List)", and "County (e.g., Franklin)" (Franklin). There are also checkboxes for "Do you require special accommodations?", "Do you have transportation issues?", and "SRC Media Consent".

Callouts in the image explain the following fields:

- "Upload a photo so staff members can ID volunteers" points to the photo upload area.
- "Shows education & expertise" points to the "Education Completed" field.
- "The DOB field feeds the Age" points to the "Date of birth" field.

To upload a photo, click Upload and this menu appears. Select your photo.

Choose a photo to upload

Choose File No file chosen

Upload Cancel

Click the Choose File button, choose a photo from your computer, and then click the Upload button. Your photo file may have any of these file formats: .gif, .jpg, .jpeg, or .png.

- The Date of Birth field helps us determine the level of Presidential Service award eligibility and the applicant's teen status as well as maturity level. The Date of Birth field feeds the Age field, so please do not alter the Age field.

NOTE: Volunteers must be at least 12 years old to volunteer.

- Fields that will help determine expertise for different assignments include:
 - Education Completed
 - Languages
 - College Major – Area of Study
 - Other Skills
- Fields that provide demographic information include:
 - Gender
 - Race

In the **Email / Text Message Preferences** section:

The screenshot shows the 'Email / Text Message Preferences' section with an information icon. It is divided into two main sections: 'Automated Messages' and 'Custom Messages'.

Automated Messages: This section has three radio button options: 'Email', 'Text Message', and 'None'. The 'None' option is selected. A callout box points to this section with the text: 'Use this section only if you use the scheduling features'.

Custom Messages: This section has three radio button options: 'Email', 'Email with Text Notification', and 'None'. The 'Email with Text Notification' option is selected. A callout box points to this section with the text: 'This is where the volunteers choose the types of messages they receive. We do not use Text Notification. If a volunteer elects not to receive emails you may not notify them using this method (call them).'

Automated Messages is only used for the scheduling feature. Most locations do not use this function.

Custom Messages are used for email from Volgistics. We currently do not use the Text Notification.

Note: We do not use the Text Message function, as each volunteer has to opt into this option to be able to use it. Volgistics does not receive text messages.

Volunteers who opt out of messages display as empty radio buttons.

The **Availability** and **Location Preference** sections are used in placing volunteers.

If a volunteer’s schedule doesn’t exactly match your needs, negotiate a schedule that works for both of you. Usually volunteers provide us with their ideal schedule, not always showing us all the time they are available.

If a volunteer has the skills or availability that meets another locations needs, email Volunteer Services. Do not contact the volunteer or another location regarding their needs.

Availability

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Morning (Opening-11):	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mid-day (11-1):	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Afternoon (1-3):	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
After School (3-6):	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening (4-7):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

My availability is:

From: to:

Number of Hours I Can Help Each Weekly

If the volunteer's preferences are not an exact match for your needs, ask the volunteer for what you want/need

Location Preference

Site			
Franklinton Branch			Edit Delete
Hilltop Branch		1st	Edit Delete
Linden Branch		4th	Edit Delete
Livingston Branch		2nd	Edit Delete
Martin Luther King Branch		3rd	Edit Delete

If your branch is not listed here, Volunteer Services clears this with the volunteer before referring them to you

The bottom of the **Profile** tab shows:

- The **Skills** the volunteer wants to share with us. These checkboxes help us match the volunteer to the right job.
- **I Want to Work with...** tells us of our customers the volunteer wants to support. This section is especially helpful for the Homework Help Centers.
- The **Grade** section is for the SRC VolunTeen program.
- **Special Events Volunteer** is an occasional volunteers who assist with special events, such as a community fair or FOL board who helps with author presentations

The screenshot shows a form with four main sections, each with a callout box:

- Skills:** A list of checkboxes including Alphabetizing, Computers, Fundraising, Job Help Center, Office Work, Sales, x Financial Literacy, Art, Crafts, Gardening/Landscaping, Maintenance, Photography, Sorting, x Health Literacy, and Teaching. A callout box says: "The special skills and knowledge the volunteer wants to share with us: what they want to go with CML".
- I want to work with...:** A list of checkboxes including Adults, Middle school students, Elementary students, Preschoolers, High school students, and Staff. A callout box says: "The customer based the volunteer wants to work with".
- Grade:** Radio buttons for 6th, Freshman, Sophomore, 7th, Junior, 8th, and Senior. A callout box says: "For SRC only". A "Clear" button is at the bottom right.
- Special Events Volunteer:** A checkbox for "Yes". A callout box says: "For volunteers who help at non-traditional special events".

NOTE: Skills change from time to time, depending on the changing needs of the library.

The Service Tab

The Service tab shows a volunteer's assignments and the time they track as they volunteer.

- The **Assignment** section shows the volunteer jobs that may be assigned to the volunteer. These are the tasks that the volunteer selects when they log into Volgistics at the beginning of their shift.
 - Do not delete an assignment if a volunteer has spent any time performing that task. To remove a task from the volunteer's login screen, click the Edit option and change the Role to Former.
 - The SRC assignment should only be active in June, July and August. If the teen continues to work with you at the end of summer, switch this off by changing the Role to Former.
 - To Add an assignment when a volunteer has additional duties, click the dropdown to see the list of available options. The role for the volunteer will then be Active.

NOTE: A time record without an Assignment will not appear on any reports. So if a volunteer logs in without selecting an Assignment, this time will not be reported. Volunteer Coordinators receive monthly reports showing all volunteer hours. Please review this carefully to make sure all your volunteers are tracking their time.

- The **Service** section shows all the time the volunteer tracks while working with us. The top portion displays the volunteer history with us, and the Add section is where a volunteer supervisor can manually add time to the volunteer's record.
 - To view the records in the service section from previous months or years, click the month you want to view, and the detailed records appear. Then click on the date you wish to review. Once in the record, changes can be made.
 - To Add time to the volunteer's record, click the dropdown list to select and assignment, select the date from the dropdown calendar, then enter either
 - The start and end time for the volunteer shift or
 - The total amount of time served.

NOTE: For Group records, enter the total time they served, enter the number of volunteers in the Volunteers field, and Volgistics will compute the total hours served.

NOTE: Groups may be assigned to several locations. Please to not remove service records for Groups.

Core Profile **Service** Schedule History Contacts Notes Vic Docs

Tagged New Previous Next

Assignments i

Assignment	Role		
Homework Help Center [Hilltop Branch\Volunteers]	Assigned	Edit	Delete
SRC VolunTeen [Hilltop Branch\Volunteers]	Former	Edit	Delete

Include matched assignments

Add

Assignment: ▼

Role: Save Cancel

Service
Expand all

Date	Assignment	Apply to	Hours
Mar 2016			5.92
Feb 2016			2.25
Life total:			8.17

Add

Assignment: ▼

Date: From time: am ▼ To time: pm ▼

Hours: Save Cancel

The volunteer's Assignment and Role determine what jobs a volunteer can log into

Additional Assignments are added here. Click the dropdown arrow and a list appears

The records of the volunteer's time are here. Click the date to alter the volunteer's service time

When volunteers forget to log in, enter their time here. Select their assignment, then the time

To add hours:

Add

Assignment: ▼

Date: From time: am ▼ To time: pm ▼

Hours: Save Cancel

Enter either the start and stop time or...

...you can enter the total number of hours served

With a Group record, enter the total number of volunteers and Volgistics computes the total hours served.

Add

Assignment: ▼

Date: From time: am ▼ To time: pm ▼

Hours:

Volunteers: (Number of group members who performed this service)

Save Cancel

The time the group spent with you

...times the number of volunteers = the total time served

The bottom of this tab shows the Mandatory Service fields. We use this section to track the hours of volunteers in programs with a specified number of hours, such as GIVE Back, GO Forward or Community Interns. We enter the total hours to be earned, and Volgistics computes the time remaining in the program.

The Schedule Tab

Please do not use the Schedule tab, as any changes you make to Volgistics affects all users.

The History Tab

This History tab is used to track:

- Required documents and the background check status
- The incentives for Summer Reading Club
- Teen’s Developmental Asset Spark
- The history of volunteer communications through Volgistics

The screenshot shows the 'History' tab for 'Doe Jr., John'. It includes a navigation bar with tabs for Core, Profile, Service, Schedule, History (selected), Contacts, Notes, and Vic. Below the navigation bar are buttons for Save, Cancel, Tagged, Previous, and Next. The main content area is divided into sections: Checklist, Dates, and a table of records.

Checklist

Checklist items

- Background Ck (Vol.Serv. Only)
- Code of Conduct
- Confidentiality Agreement
- Parent/Volunteer Agreements
- Signed Volunteer Agreements

Buttons: Save, Refresh

Dates

Start date: 06-21-2011 Date entered: 06-21-2011
 Stop date: 05-01-2014

Status	Event	Date	Expires	Notation	Edit	Delete
Applicant		07-29-2015				
Award	Bronze Presidential Service	06-15-2012		Presented	Edit	Delete
Checklist	Signed Volunteer Agreements	09-08-2015		Complete	Edit	Delete
Checklist	Parent/Volunteer Agreements	09-08-2015		Complete	Edit	Delete
Checklist	Confidentiality Agreement	09-08-2015		Complete	Edit	Delete
Checklist	Code of Conduct	09-08-2015		Complete	Edit	Delete
Checklist	Background Ck (Vol.Serv. Only)	09-08-2015		Passed	Edit	Delete
Class	Ice Cream	03-18-2014			Edit	Delete
Class	Ice Cream	06-15-2012			Edit	Delete

A yellow callout box with the text 'Track all paperwork received by Volunteer Services here' has an arrow pointing to the 'Signed Volunteer Agreements' item in the checklist and another arrow pointing to the 'Date' column header in the table.

The screen shot above is a composite of several volunteer records.

NOTE: All of the documents forwarded to us are stored in OnBase. Should you need a copy of a Background Check Authorization, Conduct Agreement or Confidentiality Agreement, we can provide a copy of the documents that were sent to us by the branches or the volunteers.

The items tracked on this tab include:

Status Type	How CML Uses It
Award	Awards received through Volunteer Services
Checklist	The required paperwork that must be in place before a volunteer can start. This shows what, if anything, is missing. When a Background Check is started, the Notation is Started and when it is returned Volunteer Services changes it to Passed
Class	Class is used for SRC incentives.

To add Incentives to the Class Status,

1. Change the Status to Class
2. Click the Event dropdown to see the list of incentives, and click the one to be awarded
3. Click the calendar to select the date the incentive

This allows you to track all of your teen’s incentives.

Add

Add a: date

Event:

Date: Expires:

Notation:

Key Spark:

Developmental Asset – Key Spark Tracking – Volgistics has space to track a teen’s Key Spark. Capturing this Spark provides supervisors with a tickler to remind them of what motivates the teen.

Add

Add a: date

Event:

Date:

Notation:

Key Spark:

The Key Spark could be a great conversation starter with a teen.

Use the Notes tab to tracking additional Sparks.

The Contacts Tab

The Contacts tab reflects:

- Employment history and
- Two emergency contacts

The employment information only shows the name of the organizations that the volunteer affiliated with.

Note: The employment information may not be the volunteer's current employer. One way to check for the current employer is to look at the email address. If the volunteer did not provide a personal email, a work email could show a current employer.

The screenshot shows a form titled "Employer" with the following fields and options:

- Last name:
- First name:
- Middle name:
- Nickname:
- Employer name:
- Street 1:
- Street 2:
- City:
- State: Zip:
- Email:
- Web site:
- Kind:
- Relationship:
- Contact Order:
- Primary Phone:
- Secondary Phone:
- Other Phone:

Buttons at the bottom: Pull from Core, Swap with Core, Save, Delete, Cancel.

A yellow callout box points to the "Employer name" field with the text: "The name of the volunteer's employer".

If a current employer provides incentives for volunteering, we add a Flag to the Core tab with the company's name. These include Nationwide, Grange Insurance, Walmart, Chase and more.

Every volunteer must provide two emergency contacts. In case of emergencies, this provides us with a backup should the primary contact not be available. Try both of the First emergency contact before trying the Second contact.

Do not reach out to Emergency Contacts for any other reason than emergencies.

Emergency contact

Last name: Doe
 First name: Mary
 Middle name:
 Nickname:
 Employer name:

Kind: Emergency contact
 Relationship: Spouse
 Contact Order: First

Street 1:
 Street 2:
 City:
 State: Zip
 Email:
 Web site:

Primary Phone: (614) 645-2275
 Secondary Phone: (614) 479-3999
 Other Phone:

Buttons: Pull from Core, Swap with Core, Save, Delete, Cancel

Pay attention to the Relationship field so you know how to address the person to be called.

The Notes Tab

The Notes tab is where all history of the volunteer’s performance and related issues are stored.

What to include in the Notes tab:

1. Notes to yourself about contacting, interviewing and placing a volunteer. Don’t assume that Volunteer Services will read this tab unless you tell us to.
2. Extraordinary and extra work that a volunteer does for you
3. Anything that you may want to remember about this volunteer and
4. Anything that builds a case to terminate a volunteer. This can include:
 - a. A factual account of the episode, remembering this is a public record
 - b. The number of a security incident
 - c. The date and initials of the person writing the documentation

If you classify a volunteer’s Status as **DO NOT PLACE** or **Review Notes**, you are **required to enter information** onto the Notes tab.



The Vic Tab

This tab would be used to give volunteers access to update their records and track time if they are working remotely. We typically do not give volunteers access to this.

If you have a trusted volunteer who is working remotely, tell Volunteer Services and we can provide them with access to VicNet.

Time Reporting

Volgistics assigns each volunteer randomly assigned PIN. Provide this to your volunteers on their first day. They will use this each time they log in at the start of their shift and at the end of the shift.

ALL volunteers track their time using Volgistics.

1. Students and paid volunteers use this information to complete their timesheets
2. Students use the total for reports for National Honors Society, college admission information, and information for external awards, like scouts
3. We used this information for annual reports and statistics requested by donors and other library departments.

During the Summer Reading Challenge monthly reporting is automatic. Volunteer Services provides each location with a report for the previous month shortly after the end of the month. Please verify the report for accuracy. This includes checking your volunteers' records to be sure they selected an Assignment each time they logged on to volunteer and are tracking their time.

Note: If a volunteer doesn't appear on the list, it's a good chance that they haven't selected an assignment when they logged in. If you noticed this, please fix the records in question and ask for an updated report.

This information may be used for reports to the Board of Directors and to donor organizations.

The time reported is used for

- Annual volunteer awards,
- Reports to our community partners, and
- Timesheets submitted to outside organizations for intern and externships and paid time reporting.

NOTES: Confirming the time each month simplifies the year end reporting process. Because we know you are looking at this each month, Volunteer Services no longer needs to confirm hours at the end of the year. This is now done on a monthly instead of annual basis.

Groups of volunteers who assist us are reported as a group, instead of as individuals. This includes groups from universities and some of our TABs.

When volunteers complete timecards for outside organizations, please check the timesheets against the recorded time in Volgistics. It is important that the timesheet is accurate before you sign off on the form.

When paid volunteers, such as those that work with us from the AARP Foundation, volunteer to work at your site, we are required to store supplemental documents, such as timesheets. Periodically forward all submitted timesheets to Volunteer Services so these can be centrally scanned and stored. Our agreement with AARP and similar groups, like those affiliated with Franklin County Job and Family Services or any Federal Work Study program, require us to store timesheets for four years.

Record Storage

Volunteers

Periodically Volunteer Services reviews our files to determine if records should remain active, be archived or deleted.

The file is...	When this occurs...
Deleted	The volunteer record has been completely processed, but the volunteer hasn't worked in three months or at the end of a program like SRC
Archived	When a volunteer has not worked for more than two months. The record can always be reactivated when the volunteer returns.
Active or Applicant	When there is an anticipated delay in service of less than three months. The volunteer supervisor makes a note in the Group field to let Volunteer Services know the record's status.

NOTE: When a volunteer fails to track their hours, their record may be deleted as being inactive with no activity. If this occurs, the volunteer needs to resubmit an application so their time can be recorded.

Supplemental Records

Paperwork, including documents signed by the volunteer before they start, timesheets for paid volunteers and other documents are scanned and stored by Volunteer Services. These records are available for a period of 7 years.

Columbus Metropolitan Library Volunteer Facebook Page

Send Volunteer Services your stories and photos of volunteer-related information so we can post it on Facebook. This page is used to publicize what our volunteers do for us. We post volunteer projects, accomplishments our volunteers have made with other organizations and thank you notices to those who help us. We post a maximum of one story per day.

Use this to:

- Recognize your volunteers for outstanding performance either in the library or for major accomplishments in their lives.
- Publicly thank volunteers for the work that they do for us. This is great for completed projects or volunteer milestones.

Note: If a photo is to be used on Facebook we must have a photo release on file for everyone in the picture. A photo release is included in the paperwork for every volunteer, so don't worry about volunteers. Please collect signed forms from individuals with large volunteer groups and any customers. Send the signed photo releases to Volunteer Services to be scanned.

Media Contacts Related to Volunteers

Please contact Marketing if contacted by someone from the media. Do not talk to the media without Marketing's guidance.

Let Volunteer Services know about any potential volunteer-related press coverage.

Evaluating Volunteer Performance

Staff may review the performance of a volunteer when:

1. A teen completes a program with us and they request an evaluation
2. An adult volunteer completes a year with us, and asks for an evaluation
3. A volunteer requests an evaluation of their work at any time

A preferred performance evaluation should take place as a coaching session where a volunteer sits down with their supervisor to discuss performance issues. If there are negative issues to discuss, always provide the volunteer with ways to improve their performance.

If there are performance issues with any volunteer, please hold a corrective action discussion with the volunteer immediately. Do not give the volunteer an opportunity to influence other volunteers or customers.

The VolunTeen form is available on the V drive (V://CMLINFO/VOLUNTEERS/Volunteer Forms/VolunTeen Performance.pdf). The form is intended for teens, but can be used for adults. The form was designed to be simple and easy to complete.

For teens, the intent is to provide a work record for when they enter the job market.

If the volunteer's performance is unsatisfactory, consider a coaching session with the intent of improving the volunteer's performance or removing them if the coaching fails. If this is not an option, negative performance reviews may not be provided without a written record of counseling sessions with the volunteer.

Note that unsatisfactory or unpleasant comments may cost you a valuable volunteer.

Letters of Reference and Recommendation

Letter Type	What to Include
Reference	The length of service and the volunteer's duties
Recommendation	A complementary letter that promotes a volunteer's work as being exemplary

As a general rule, CML does not provide letters of recommendation, however, due to the nature of relationships we develop with volunteers, Volunteer Coordinators may write a careful letter endorsing an exceptional volunteer.

When organizations are sued over letters of reference or recommendation it is for one of two reasons:

1. The letter is negative and hurts the candidate's chance for a position or
2. The letter fails to accurately reflect the candidate's performance

Basic rules of these letters includes:

1. Who can write them: Only Volunteer Coordinators can write these letters, as they are the branch's senior volunteer staff member and are legally responsible for the contents. Volunteer supervisors can provide input, but only a Coordinator can write and sign the letter.
2. The type of relationship with the volunteer: strong to exceptional
3. The letter type and content: dictated by the performance of the volunteer

A letter is not warranted when:

1. Someone has not volunteered with us (a customer)
2. The volunteer was not directly supervised by a volunteer supervisor
3. The volunteer failed to perform the minimum of 15 hours

To know when to write a letter and when not to write a letter:

The Requestor Is	Number of Hours Worked	Letter?	Reference or Recommendation
Not a volunteer	None	No	No letter
Volunteer with less than the minimum time	Fewer than 15 hours	No	No letter
Volunteer with minimum hours	15 hours	No*	No letter
Volunteer with limited hours	16 and more	Basic form letter only	Reference
Volunteer leader who repeatedly supported CML staff	100 and more hours plus serves in a leadership role	Full letter detailing the responsibilities of the volunteer	Recommendation

*When being pressured for a letter for college admission or scholarship applications, use the standard form that states start and end date and the total number of hours. Do not include any additional comments.

In a letter of reference, you may include general, factual information only (see template).

1. The number of hours the volunteer worked for you
2. The dates they began and the last date they worked for you
3. A list of the duties the volunteer performed
4. A factual representation of the work

Tips on writing letters of reference:

- Use the basic form letter
- Do not include information that you cannot readily obtain by looking at the volunteer's record (the Notes tab on Volgistics).
- Do not exaggerate a volunteer's skills to make them look better than they are.
- No personal opinion in these letters.

Letter of Reference – Basic Form Letter



Letter of Reference Basic

V: » CMLINFO » VOLUNTEERS » Volunteer Forms



96 S. Grant Ave.
Columbus, OH 43215
columbuslibrary.org | 614-645-2275

(Date)

To whom it may concern,

(Name) volunteered a total of (hours) at the (branch name) of Columbus Metropolitan Library.

(He/She) worked:

- Start date:
- End date:

(Name)'s role with us was as a (Type of volunteer if applicable, e.g., circulation support, reading buddies).

Sincerely,

(Supervisor Name), (Job Title)
(Location Name)

Canal Winchester • Driving Park • Dublin • Franklinton • Gahanna • Hilliard • Hilltop • Karl Road
Linden • Livingston • Main Library • Marion-Franklin • Martin Luther King • New Albany • Northern Lights
Northside • Parsons • Reynoldsburg • Shepard • South High • Southeast • Whetstone • Whitehall

A personalized Letter of Recommendation is reserved for exceptional volunteers only. When a volunteer provides us with outstanding service we can provide them with a document *upon request*.

Examples of exemplary service include:

- A teen who works with us for several years during SRC, and they were invaluable to you. Whenever you needed help, this person was there for you. They were a big help during programming, and outside of the library they recruited friends to help with special events. They are looking for a letter for their college application.
- Someone who helps with Reading Buddies week after week and helps with miscellaneous tasks related to the program. If someone comes late, they stay late to make sure everyone gets a chance to read. They are being considered for a community award and would like a letter.
- A College student worked with your location and several others to provide special educational experiences for your Homework Help customers. They took the initiative to set up the room, manage the programs and helped tear down and straighten the room when they finished. This leader provided learning experiences they would not have received on their own. Now this student wants to go to graduate school.
- A college instructor has been working with your kinds on Fun Fridays, bringing in a new science project each week for over a year. Your kids love it, and attendance has increased because of their activity at your branch. They are looking for a letter of support for a grant. For this letter, reach out to your PS Director to write the letter.

Tips on writing letters of recommendation:

- Stick to the facts and be truthful. No opinions, just unbiased, honest information. Only provide information that could be factually verified in a court of law.
- If the letter is negative in any way, do not write it. Use the Letter of Reference form letter instead.
- Never provide false, exaggerated or misleading information.
- Use the information on the Notes tab to write the letter. Be sure to copy the text from the letter into the Notes tab so future staff can read about the service the volunteer provided.
- Use the sample template.
- Call the Volunteer Services Manager with questions or if you need help writing this type of letter.

NOTE: Forward all requests for Letters of Support to your PS Director.

Don't use general phrases that have little meaning	Use concrete examples that display the volunteer's exceptional performance
Mary was great	When working with students, Mary asked questions to find out what our customers needed, and then shared resources so the student could correctly finish their homework without direction from staff.
We enjoyed working with John	John integrated what she learned from staff into her daily dealings with our customers. For example, we watched as he modeled the behavior we discussed with parents as he was working with their children.
Mary ran the Homework Help Center	When staff weren't available Mary assisted other volunteers by answering questions and making sure everyone who needed help received assistance
Customers loved John	When working with teens, we observed John responding to personal, sometimes inappropriate, questions in a way that was respectful and professional. For example, when teens asked John about his girlfriend, he turned this into a teaching moment.

Letter of Recommendation – A Template

All letters of recommendation are tailored to the volunteer and the situation for the letter. This template will help guide the creation of a solid letter of recommendation.

Section	What It Should Do	Sample Text
Opening	Establish the nature of your relationship with the volunteer	To complete her bachelor's degree at The Ohio State University, Mary Doe worked with Columbus Metropolitan Library from September 16 through October 30, 2016, exceeding her 60-hour requirement for graduation. During that time she worked with a variety of staff, gaining a wide range of experience to help her prepare for her career.
Body	<p>Detail what made this individual outstanding.</p> <p>Tell a story about your experience with this volunteer.</p>	<p>During Mary's time in our Ready for Kindergarten area we came to rely on her to make sure the area appeared to be fresh for new customers, no matter what time of day or the type of activity took place earlier that day. As a result, each child who visited had the best possible experience at the library.</p> <p>When we see 25 to 35 children in an afternoon this is not a simple task. Mary quickly learned the natural traffic flow in the area and was able to anticipate what would attract a child next. Somehow she always stayed three steps ahead of our young customers.</p>
Closing	What are your final thoughts about this volunteer? What are your thoughts about his/her future?	<p>During her time with us, staff relied heavily on Mary's abilities to manage our children's area. She will be sorely missed by customers and staff.</p> <p>I look forward to hearing stories about Mary's success as she enters her career as a preschool teacher.</p>

Sample Recommendation Letter

To Whom It May Concern:

This letter is to recommend Kathryn Smith for your graduate program at John Carroll University.

Opening

Katie served as a leader for us at our Martin Luther King branch of the Buckeye Leaders at the Library, a program from the Ohio State Office of Social Change. This program is designed to help kids get excited about learning and college.

I enjoyed hearing Katie talk about programming that she delighted in presenting to our students in the Homework Help Center. It included everything from teaching about healthy eating to strong science-based programming to working with therapy dogs. All of this gave our students a glimpse at studies and jobs they never knew were possible.

Body

This programming is important to us because it provides our young customers with a view of the world they would never see by staying within the limits of their community.

In evaluating her programming efforts, Katie admitted that their presentations weren't always home runs. In evaluating what could have been better, she was able to spot the outside factors that detracted from the event. Rather than place the blame on what was wrong, she presented ways to make the event better for future presenters.

It speaks volumes to me that Katie was asked to take a leadership role by OSU after three months of working with her team.

Whether showing the kids practical applications of mathematics or song lyrics as poetry, Katie and her team led students to new interests and excitement about learning. Her willingness to volunteer with us outside of her OSU assignment show her interest in sharing her love of learning with our students.

Stories

Katie's programs made a significant impact on our students. As the teens talked to friends about the Buckeye Leaders programming, our attendance figures increased significantly.

Sincerely,

Closing

Betty Jones
Volunteer Services Manager

When It's Time to Say Goodbye (or Fire) a Volunteer

When there are:

- Performance issues
- Behavior issues or
- Other factors that affect staff, customers or fellow volunteers

First line of action is to counsel the volunteer in hopes of turning their performance around. Talk to the volunteer about the issue and see if there is a legitimate reason for the behavior. Remind the volunteer that they signed the Conduct Agreement and are obligated to follow it.

If you feel it is necessary to terminate a volunteer and you need help, call Volunteer Services. We will guide you through this process.

The steps to terminate a volunteer are similar to those used when terminating a staff member. Before terminating a volunteer, follow these steps: The steps to take when terminating a volunteer include:

1. Counsel the volunteer on their behavior
2. Provide an oral warning of termination if the behavior doesn't change
3. Perform a written warning of termination if the violations continue, then
4. Terminate the volunteer.

When terminating someone:

1. Never do it alone: always have a reliable witness in the room with you. It should be a paid staff member.
2. After you explain the situation and let the volunteer know they are no longer welcome to volunteer with you, stop talking. Do not give the volunteer an opportunity to talk you out of your decision or make concessions on their behalf.

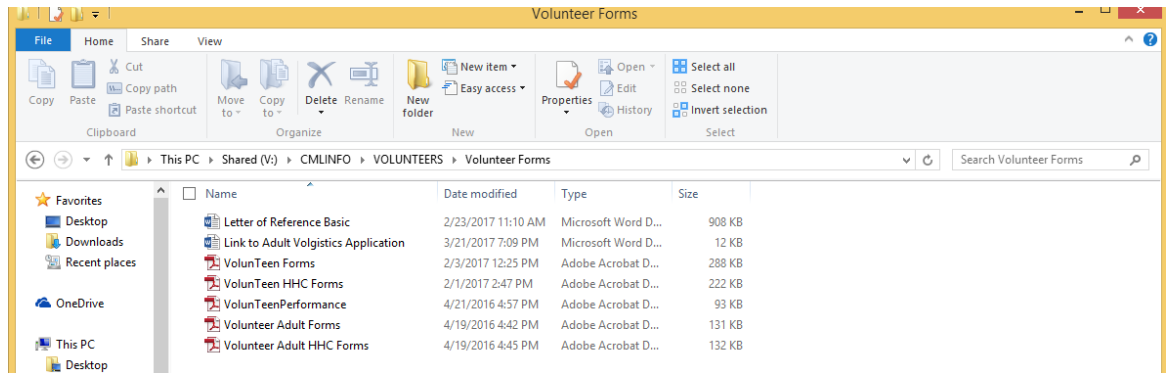
If you are not comfortable terminating a volunteer, contact Volunteer Services and we will walk you through the process, including meeting with you and the volunteer.

Let any terminated or former volunteer know that they are always welcome to use the library as a customer.

Don't forget to document all non-routine conversations with volunteers on the Notes tab in Volgistics, including warnings and termination discussions.

Where to Find the Forms:

V: //CMLINFO/VOLUNTEERS/Volunteer Forms/...



Record Keeping for Outside Organizations

For several organizations, such as Franklin County Ohio Department of Job and Family Services, Federal Work Study, AARP, Eckerd and similar programs

1. Participants will be doing double record keeping: with FCJFS and us in Volgistics
2. All timesheets will be submitted, with a copy going to Volunteer Services. At the end of the participant's service Volunteer Services scans all timesheets into CML's long-term record storage database.
3. All monthly and end-of-service evaluations forwarded to Jewish Family Services are also sent to Volunteer Services. At the end of service all documents are scanned and stored in OnBase for long-term storage.