

University Retirees Volunteer Center (URVC)

Toolkit

7/7/21

URVC Handbook (2020 – 2021)

- i. Describes the overall processes and procedures
- ii. Includes
 1. Office Basics (organizational chart, list of people, office procedures, office equipment and supplies, website monitoring and updating)
 2. Engaging with Volunteers (examples of ways to connect with people)
 3. Technology Basics (Better Impact Volunteer and Project tracking database)
 4. Common project areas
 5. Project Folders (how to handle and enter project information)

URVC Operations Handbook
2020-2021

Table of Contents

Introduction

Part I: URVC Organizational Structure

- | | |
|---------------------------------------|---|
| 1. URVC Board of Directors | 4 |
| 2. URVC Organizational Chart | 5 |
| 3. URVC Committees | 6 |
| 4. URVC Policies | 7 |
| 5. URVC Financial Management & Budget | 8 |

Part II: Volunteer Engagement

- | | |
|--|----|
| 6. Volunteer Intake Process | 9 |
| 7. Volunteer Orientation and Checklist | 9 |
| 8. Volunteer Engagement Resources | 10 |

Part III: URVC Office Procedures

- | | |
|--|----|
| 9. URVC Office Information | 11 |
| 10. URVC Office Procedures | 12 |
| 11. Photo Release Process | 23 |
| 12. URVC Office Staff Roles & Responsibilities | 26 |

Part IV: Technology Basics

- | | |
|---|----|
| 13. Navigating Better Impact | 31 |
| 14. Navigating Better Impact as a Volunteer | 32 |
| 15. Working with the URVC Team Drive | 33 |
| 16. URVC Website | 34 |

Part V: Common URVC Project Areas

- | | |
|-----------------------|----|
| 17. Tutoring | 35 |
| 18. Ushering/Greeters | |
| 19. Health Research | |
| 20. One-Time | |
| 21. On-Going | |

Appendix:

- | | |
|---------------------------------------|----|
| URVC Bylaws | 37 |
| Project Intake Information Form (PIF) | 42 |

Introduction

The URVC has been in existence since 1987. It was the first of its kind at a higher education institution and grew into the active organization that it is today. The URVC is connected to the University of Minnesota through our host department, University Relations, which provides financial support.

The University Retirees Volunteer Center (URVC) facilitates matching approximately 450 volunteers to projects which are enhanced—and often only made possible--by the service of volunteers. The URVC has been connecting volunteers to projects for more than 30 years. In a typical year our volunteers supported about 80 projects occurring on the University of Minnesota campus and throughout our Twin City metro communities with over 10,000 hours of service.

This handbook is a compilation of contributions by Sally Shackel, Marva Sullivan, Alan Kagan, and Randi Lundell (Handbook editor and process lead). It is revised annually and available on the URVC Team Drive.

McNamara Center
URVC Office
December 15, 2020

Part I: URVC Organizational Structure

1. URVC Board of Directors

The URVC Board of Directors' officers are Chair, Vice Chair, Secretary, and Treasurer. Heads of Committees are included in board meetings by invitation if not already a Board Member. The URVC Chair guides the overall mission of URVC and ensures that its operations are aligned with the URVC mission statement: *The **University Retirees Volunteer Center (URVC)** is dedicated to connecting volunteers with service opportunities within the University of Minnesota and surrounding community.*

The URVC Vice Chair supports the activities of the Chair and assumes the Chair's responsibilities in the Chair's absence (e.g., Board meetings).

The URVC Secretary records minutes of board meetings, confirms with Chair. .

The URVC Treasurer is responsible for finance and the annual budget proposal in cooperation with the Chair, including purchasing and ensuring expenditures are aligned with UMN financial policies and procedures.

The URVC Heads of Committees: Communications, Engagement, Outreach, Tutoring, Health Research, and Community Service.

Current Board Members, including Committee Chairs, are listed below:

Chair: Eric Hockert (Tel: 651-528-8099; term expires 7/23)

Past Chair: John S. Anderson (Tel: 651-489-4330; term expires 7/23)

Vice Chair: Randi Lundell (Tel: 651-336-7216; term expires 7/23)

Secretary: Leslie Koidahl (Tel: 612-807-4282; term expires 7/22)

Treasurer: Judy Cox (Tel: 651-338-8484; term expires 7/22)

Nominations Chair: Alex & Lucy Levitan (Tel: 651-317-3720; term expires 7/21)

UMRA Program Chair Jan Morlock (Tel: 612-518-1091; term expires 7/21)

Alan Kagan (Tel: 651-457-6586; term expires 7/21)

Deanne Magnusson (Tel: 952-465-7381; term expires 7/22)

Jeanene Noll (Tel: 612-807-4282; term expires 7/22)

Marva Sullivan (Tel: 612-331-6988; term expires 7/23)

URVC Coordinators and Committee Chairs:

Better Impact Specialist: Sally Schakel

Communications Chair: Deanne Magnusson (Tel: 952-465-7381; term expires 7/22)

Development Chair: Eric Hockert

Health Research Chair: Sally Schakel (Tel: 651-436-8868; term expires 7/23)

Media Specialist: Marva Sullivan (Tel: 612-331-6988; term expires 7/23)

Mentoring Chair: Deanne Magnusson

Outreach & Engagement Coordinator: Randi Lundell

PIE Coordinator: John S. Anderson

Strategic Planning Chair: Deanne Magnusson

Tutoring Coordinator: Alan Kagan (Tel: 651-457-6586; term expires 7/21)

2. URVC Organizational Chart

URVC Organizational Chart



3. URVC Committees/Chairs/Coordinators:

1. Development – (Eric) Works to raise funds for URVC.
2. Strategic Planning – (Eric, Deanne) Work to articulate vision and mission of URVC.
3. Communications, Marketing & Outreach – (Deanne Magnusson) Works to implement policies and processes for public outreach.
4. Tutoring – (Alan Kagan) Works to coordinate tutoring projects.
5. Mentoring – (Deanne Magnusson) Works to coordinate mentoring projects for undergraduate research and similar UMN project areas.
6. Health Research – (Sally Schakel) Works to coordinate health research projects.
7. Nominations – (Al Levitan) Works to nominate to Board.
8. Outreach and Engagement – (Randi Lundell) Works to engage volunteers outside of and within URVC, coordinates events, serves as liaison with external/internal project managers.

4. URVC/UMN Policies and Procedures

- The URVC adheres to UMN policies and procedures as outlined in the UMN Policy Library: <https://regents.umn.edu/policy/all>
- All URVC board members and staff are to keep in mind their training and background at the UMN and to serve the community. Their conduct and behavior reflect on the UMN although they are not still employed by the UMN.
- We expect the highest standards of conduct for our URVC volunteers and will work to communicate expectations on a regular basis.
- URVC volunteers are also expected to follow the policies and procedures outlined by individual volunteer entities and institutions.
- Please be aware that the document below may be required for volunteers internal to UMN:

Document OGC-SC214 Volunteer Agreement and Release

<https://policy.umn.edu/sites/policy.umn.edu/files/.../ogc-sc214.docx>

5. URVC Financial Management and Budget

The URVC receives an annual allocation from the Office of University Relations. This money is used to pay for a volunteer management software (Better Impact), student worker, parking fees, printing costs, offices supplies, and volunteer recognition events.

The URVC Treasurer maintains the budget and gives regular accounting to the Chair and the URVC Board as required.

Part II: Volunteer Engagement

6. Volunteer Office Intake Process

Volunteer Profiles:

1. Respond to inquiry from prospective volunteers.
2. Send “welcome” letter with instructions to access BI and complete the volunteer profile.
3. Connect volunteer with requested activity.

Volunteer profiles must be maintained in Better Impact so that volunteers can be assigned to activities and credited with volunteer hours (see section on Better Impact).

Reports can be generated in Better Impact (BI).

7. Volunteer Orientation

“Get Started” page on website: <http://www.urvc.umn.edu>.

Follow-up phone call/email/welcome letter.

(TBD Fees: Propose “Welcome Packet” Covers background check (?), name tag, entry into BI database, special offers, and invitations to volunteer events. (\$40))

URVC Volunteer Orientation Checklist

- Are you aware of the URVC website: www.urvc.umn.edu ?
- Have you entered your contact information into Better Impact (BI)?
- Are your preferences for volunteering identified in BI?
- Have URVC staff contacted you in person by phone and/or email to follow-up on your BI entry?
- Do you have dates and directions to your project?
- Have you connected with your on-site project director?
- Do you know other UMN retirees with whom you can connect?
- Do you have any physical limitations that would prevent you from participating?
- Are you a member of the University of Minnesota Retirees Association (UMRA)?
- Do you receive the UMRA newsletter?
- Do you receive notices from the URVC Office regarding volunteer opportunities?
- Do you have any suggestions for the URVC Board?
- Do you have any suggestions for the URVC Office Staff?
- What would you like to see added in the way of URVC volunteer opportunities?
- Do you want to receive a URVC name tag?
- Did you sign up for the URVC newsletter (forthcoming)?

8. Volunteer Engagement Resources:

See: <https://www.energizeinc.com/>

Topics:

- Recruitment
- Selection and Role
- Induction
- Learning and development
- Retention
- Recognition

Idealist: <http://www.idealists.org>

National Service Resource Center: <http://www.nationalserviceresources.org>

Volunteering England: <http://www.volunteering.org.uk>

Service Leader: <http://www.serviceleader.org>

Center for Association Leadership: <http://www.asaecenter.org>

Board Source: <http://www.boardsource.org>

Taproot Foundation: <http://www.taprootfoundation.org>

Association of Leaders in Volunteer Engagement: <http://www.volunteeralive.org>

HandsOn Network: <http://www.handsonnetwork.org>

Volunteers Insurance Service: <http://www.cimaworld.com/htdocs/volunteers.cfm>

The URVC sponsors an annual appreciation event for volunteers every year.

Other events to help with recruiting and appreciation are:

- Monthly birthday coffees.
- Awards for most hours volunteered annually.
- Family potluck picnic.

Part III: URVC Office Procedures

9. URVC Office Information

Office Location:

McNamara Alumni Center
Phone: 612-625-8016
E-Mail: urvc@umn.edu
Web: www.urvc.umn.edu

Office Staff:

Monday: Sally Schakel
Tuesday: Sally Schakel
Wednesday: Sally Schakel
Thursday: Alan Kagan
Friday & Saturday: Alan Kagan

Office Equipment

Phone: 612-625-8016

Answer the phone: “University Retirees Volunteer Center. This is (your 1st name).”
If the red VCML light is flashing on the phone there is a voice mail message. Press * 5 (STAR 5). You will be asked for the passcode. Press 4576586# and follow instructions.

To access phone messages from outside the URVC Office:

1. Dial 612-626-0001
2. Extension 58016#
3. Passcode 4576586#

Desktop Login: Username: .\URVCStaff263 Password: McNamara263

Email: urvc@gmail.com / mail.umn.edu

Email Login: Username: urvc Password: 2020Officestaff263!

Printer: Turn on/off.

Keys to file drawers: Located far left on desk in metal holder.

Office Supplies:

Parking Vouchers for Projects: In file cabinet in “Parking” file.

Parking Vouchers for Staff & Visitors: In file drawer under printer (Note: new parking machines at UMN do not accept vouchers).

Envelopes: On shelf.

Stamps: In file drawer under printer.

Coffee: Bring your own mug. Enjoy!

10. URVC Office Procedures

1. Project is selected, announcement written, project entered into Better Impact (BI).

Staff: Project Director and Media Specialist

Process: Project entered into Better Impact, but not activated until it is reviewed for content and BI settings (e.g., schedule, visibility etc.). BI Specialist reviews the project announcement and determines the settings to be used for the activity in Better Impact. Project is reviewed and approved by Project Director *before* its release to Media Specialist for mock-up and dissemination.

1. Project is selected. (Project Director)
2. URVC Project Information Form (PIF) is used to provide detailed information for the project announcement. (Project Director)
3. Draft of the announcement is written. (Media Specialist)
4. Draft announcement is sent for review and approval. (Project Director)
5. Better Impact settings for the project are determined. (BI Specialist)
6. Project is prepared for entry into Better Impact but is not activated. (Media Specialist)

2. Project sheet and phone list are created in Team Drive

Staff: Office Staff

Process: Continue to create a project sheet and place it in the Team Drive. Print the phone list from Better Impact using the General Interest category (or categories) that best describes the project. Move a digital copy of the announcement to Team Drive.

Creating a Project Sheet in Team Drive:

1. Open a Universal Project Form: Projects>Project Forms>Universal Project Form
2. Make a copy of the form: From the File menu, select “Make a Copy” and enter the name of the project.
3. Move the project form: From the File menu, select “Move > Projects > Current Projects 2020-2021.”
4. Select the appropriate category for the project:

Research

Scheduled or One-Time

Tutoring

Unscheduled or On-Going

Ushering

5. Complete the form with project name, department or agency, location of event, coordinator name and contact, date/hours of event, and registration procedure.

6. Enter names and contact information for volunteers who register.

Creating a Phone List in Better Impact:

1. Go to: **Communicate>>Create Phone List.**

2. In the Module and Status Filters box, click on **Volunteers** who are applicants, in process, or accepted. You will not want “inactive “volunteers on the phone list.

3. Do not filter any of the email options under **Communication Filters**, unless you want only those without email on the phone call list.

4. Click on the **Add Search Criteria** button. From the dropdown list, select “General Interests.”

5. Check the box next to the General Interest category(s) that fits the type of activity for which you will be phoning. Volunteers who selected this General Interest in their volunteer profile will be on the phone call list.

6. Click the **Add and Go** button.

7. Click the **Search** button. A phone list will be generated based on your search criteria.

8. Download the phone list, open it, and print.

9. To print phone lists for more than one General Interest, repeat the process.

Move a digital copy of the announcement to Team Drive

1. In Team Drive, open the folders: Announcements > 2021 Announcements.

2. Select the appropriate folder for the project: Research; Scheduled or One Time; Tutoring; Unscheduled or On-going; Ushering.

3. Select +New in the upper left, then “File Upload”.

4. Open the document containing the announcement and it will upload into Team Drive.

3. Project is announced to volunteers.

Staff: Better Impact Specialist

Process: Activate the project in Better Impact. Send project announcement to volunteers using the Better Impact email system.

Details: Project is announced to volunteers via email. (BI Specialist)

1. Activate the project in Better Impact.
2. Send project announcement to selected volunteers using the Better Impact email system:
 - a. Select recipients based on the General Interest category (or categories) that best describes the project. Include URVC Office staff and the URVC Board of Directors on the blind copy list
 - b. Copy the announcement into the body of the email.
 - c. Send email. A log of sent messages is retained in the Better Impact “Email History “ file.
3. Send the project announcement to selected volunteers using the Better Impact email system. Include URVC Office staff and the URVC Board of Directors on the blind copy list.

4. Project is announced to Osher Lifelong Learning Institute (OLLI) and UMRA ListServes.

Staff: Alan Kagan (OLLI) and John Anderson (UMRA)

Process: This is optional. Alan for OLLI and John for UMRA will determine the projects to announce.

Details: To send an announcement to OLLI members check with the OLLI staff member who sends notifications in their “Up-to-Dater.” Edit the announcement to address OLLI members rather than URVC members. Make similar edits for the UMRA announcement.

5. Interested Volunteers respond to the project announcement.

Staff: Office Staff

Process: Volunteers may sign up through BI or send an email message to urvc@umn.edu or by calling the office at 612-625-8016.

Details:

Signing up through Better Impact. *A notification of a volunteer's interest is automatically sent to the URVC office email:*

University Retirees Volunteer Center

A volunteer in your organization has changed their availability.

Volunteer Details:

Name: Prof. John S. Anderson

Email Address: ander049@umn.edu

Activity Details:

Educator - Tutor International Students - Facilitator for Partners-In-English: Wednesdays afternoon group

Availability Details:

The volunteer is available for these shifts:

Wednesday, March 20, 2019 from 4:00 PM until 6:00 PM

6. Volunteers are assigned to the project in Better Impact (BI).
--

Staff: Office

Process: Volunteers are automatically assigned (for self-scheduling projects in BI) or must be assigned by office staff.

Details:

a. Automatically assigned (self-scheduling projects).

These are activities, such as ushering for the Rarig Theater, where volunteers are automatically assigned to the schedule when they select the date/shift from MyVolunteerPage. When the shift is filled (e.g. 2 volunteers have signed-up for a Rarig date) it no longer appears as an option to volunteers.

To verify that a volunteer has self-scheduled, enter the volunteer's name in the "search" box; then go to **Schedule** and scroll down to **Scheduled Activities > Activity** to see if the activity, date, and shift are assigned to the volunteer.

Reports of scheduled activities with the assigned volunteer names can be run in a variety of formats from **Reports > Schedule Reports** (examples follow).

b. Administrator assigned (office staff).

Very few of the URVC projects are "self-scheduling". For most projects, the URVC office first must confirm with the organizational project coordinator that a shift or activity still is open and a volunteer is needed. Alternatively, the volunteer must be directed by

the office to sign-up through a link on the organization's website and not directly through Better Impact.

On the administrator Home page, look in the **Status Update** box for any volunteer sign-ups that must be confirmed. If the **Pending Signups** bar is highlighted, click on it to view the volunteers that are waiting assignment to an activity. After you have determined that the volunteer can be confirmed for a project or can go on to the next step such as registering on a website, assign the volunteer to the project.

*Note: Refer to more detailed instructions in Better Impact system.

7. Confirmation of assignments are provided to volunteers.
--

Staff: Office Staff

Process:

- 1) Email volunteer to confirm that their request has been received and/or accepted. Final confirmation comes from the organization's volunteer coordinator, or through registering online.
- 2) Provide detailed information needed to complete their assignment (e.g., register via a website).
- 3) Provide the coordinator's contact information.
- 4) Provide a statement that this information also is contained in Better Impact in the informational button next to the activity/shift in their schedule tab.
- 5) Mail parking coupons for on-campus activities unless otherwise provided by the University unit as is typical for medical research.

Details:

When volunteers sign up for an activity on MyVolunteerPage, a red box briefly appears that tells them either they are confirmed (self-scheduled activities) or that they are not yet assigned and will receive further information. This notification goes away too quickly to be easily noticed, and Better Impact is not able to slow down the speed of the notification box. Therefore, staff will need to notify volunteer that their request has been received.

Note: Volunteers who have checked the **Subscription** setting in MyVolunteerPage.com will receive an email reminder of their assigned activities for the next two weeks and a calendar view of their assigned activities. The volunteer must "opt-in" to this service; the administrator cannot enable it for a volunteer.

8. Assigned volunteers are recorded on the project sheets in the Team Drive.

Staff: Office Staff

Process: After assigning volunteer in BI, record it on the project sheet in the Team Drive.

Details:

Assigned volunteers are recorded on the project sheets. (Office Staff)

At the time you assign a volunteer to a project in Better Impact, also record it on the project sheet in the Team Drive. We will continue to use both the Team Drive and Better Impact to maintain lists of projects and volunteers.

The Better Impact Schedule Reports can be printed to show who is assigned to a scheduled project, including a calendar report that shows dates when a shift is not filled. Use the “Single Activity by Date” or “Single Activity by Month” reports.

9. Volunteers are phoned to fill volunteer activities.

Staff: Office Staff

Process: Use the printed phone list (generated by BI) to call volunteers who have indicated interest in this type of project. Assign them to projects in BI using instructions above and record their name on the project sheet in the Team Drive. On the phone list, indicate that the person has been called, accepted or not, or if message has been left.

10. Project coordinators are provided the list of volunteers assigned to the project.

Staff: Office Staff

Process: Continue to email project coordinators the names and contact information of potential volunteers. Ask the coordinators to confirm the assignment with the volunteers and the URVC.

11. Recording Volunteer Hours in Better Impact

Details:

Volunteer hours are recorded in Better Impact (BI Specialist)

a. Automatically recorded (scheduled projects)

Projects with a specific date and shift time will be set up to automatically record a volunteer's hours after the date has passed.

b. Volunteer recorded (URVC member)

Volunteers are encouraged to enter their volunteer hours for “unscheduled” projects (e.g. those where hours are flexible). Many of these are on-going, rather than single-event, activities. Instructions for the volunteer are found on their MyVolunteerPage home page under Files: *Users Guide for Volunteers*.

c. Administrator recorded (BI Specialist)

At the end of each month, hours recorded for volunteers assigned to projects will be checked and missing hours will be entered by the administrator. Office Staff will also contact volunteers twice annually (fall & spring) to gather information regarding hours of service.

Add hours for a volunteer

1. In the search box, type in the volunteer's name.
2. In the menu under the volunteer's name, click the “Hours” tab,
3. Click “New Timelog Entry” button.
4. Select Activity from dropdown. If the activity does not appear under Recent, find it under Active or Inactive.
5. Enter date of activity and number of hours.
6. Click “Save.” If you want to add hours for the same volunteer and same activity but on another date, click the “Save and Log Another” button; then enter the new date and hours.

Edit hours logged for a volunteer

1. In the “Hours” tab, hover over the “Options” icon to the left of the logged hours.
2. Options are View, Edit, Delete.
3. Select “Edit” to change the number of hours.
4. Select “Delete” to remove the hours.
5. Click the “Save” button.

12. Creating and Maintaining Volunteer Profiles in Better Impact
--

Details: Volunteer profiles must be maintained in Better Impact so that volunteers can be assigned to activities and credited with volunteer hours.

For each volunteer in the Better Impact database, URVC maintains three sections of the volunteer profile:

Contact: Required fields are username, volunteer's first and last name and postal mailing address. If a mailing address is not known, enter “Please Update” into the address fields.

Optional fields are email address and phone number. The volunteer's password can be changed from this window.

Custom Fields: Enter into appropriate text boxes any that apply:

UMN Faculty Departments/Colleges

UMN Staff Departments/ Colleges

UMN Alumni Departments/Colleges

Other Affiliations

Profession

Skills, Hobbies, or Interests

General Interests: Check all volunteer activities of interest to the volunteer. Currently there are 42 categories covering a wide range of interests that serve both the University and the wider Twin Cities community. Broad categories include the following:

Evaluation of student projects

Event assistance

Medical research participation

Office assistance

Social welfare assistance and civic engagement

Tutoring and student mentoring

Usher/Greeter

1. Profile is updated by the volunteer in Better Impact. (URVC Member)

Current URVC volunteers can update their profile in Better Impact by logging onto MyVolunteerPage.com and clicking on the My Profile button on the upper right. A dropdown menu will allow them to update their contact information, password, interests, qualifications, and availability. The Additional Information box allows volunteers to report their affiliation with the University and their special skills or hobbies.

Administrators (URVC Office) do not receive notification of changes made by a volunteer to contact information or general interest preferences. Using Better Impact, rather than FileMaker Pro, to create phone and email lists and to send out project announcements, will ensure the most current volunteer information is used.

2. Profile is added by a new volunteer into Better Impact. (New Volunteer)

A new volunteer should be encouraged to enter their own profile into Better Impact, rather than having the URVC office staff create the profile for them. This should reduce the number of volunteer surveys that are sent by the office to new volunteers. Volunteers can use the URVC webpage entitled Get Started (<https://urvc.umn.edu/get-started>) to link to the URVC application form. Volunteers will create their own username and password, fill out the application, and submit it.

At this point the URVC office will receive an email notification that an application has been submitted and must be accepted. In the Administrator's View, 1) enter the applicant's name in the search box, 2) click on the applicant's Miscellaneous tab and in the Status dropdown menu, select "Accepted". Click Save.

A new applicant also can be accepted from the BI home page: 1) Click on **Applicant** in the Status Update box for a list of new applicants waiting acceptance; 2) select "accepted" from the dropdown box next to the volunteer's name.

3. Administrator enters a volunteer profile for a person who does not log into the system (e.g. has no online access). (Office Staff)

For volunteers who do not have online access or are not comfortable using the Better Impact software, an administrator can enter those volunteer profiles. Required information that must be provided by the volunteer includes: first and last name; mailing address; phone number; and general interest preferences. An email address can be listed for those who have email and would like to receive URVC announcements via email, but do not wish to use Better Impact.

Follow these steps to add a volunteer profile:

1) From the menu bar, click on People and from the dropdown list, select Volunteers > Add a Volunteer

2) Click the box at the top of the Profile form that says:

"This profile represents a person who doesn't log into the system. If checked, a username and password will be automatically generated."

3) Fill out the form with the information provided to you by the volunteer.

The flagged items are required fields. If you don't have information for a required field, type "Please Update" in the field so that you can continue with the process. Try to get the missing contact information from the volunteer at a later time.

4) Scroll to the bottom of the form and select "Accepted" under the Status dropdown.
Save.

5) Check the volunteer's preferences for types of volunteer activities under the General Interests tab.

6) Add any other pertinent information provided such as qualifications or availability, using the appropriate tabs.

4. Profile is updated by the administrator (Office Staff)

1) Type in the volunteer's name in the Quick Search box.

2) Click on the volunteer's name from the list that appears.

- 3) From the volunteer's Main tab, select the section you wish to update.
- 4) Change the field and Save.

5. Profile is removed by the administrator. (Office Staff)

A volunteer is deceased, moves away, or resigns as a URVC member.

- 1) From the menu bar, click on People, and from the dropdown go to Volunteers > Remove Volunteers.
- 2) Under the Status Filter select the type of volunteer you wish to remove (e.g. accepted, inactive etc.).
- 3) Click on the Search button.

An alphabetical list of volunteers that match your filter will appear. Scroll down to the volunteer you wish to remove, hover over the dark square to the left of the volunteer name, and select "remove" from the dropdown list.

6. Profile is changed to inactive by the administrator. (Office Staff)

A volunteer is unable to participate in URVC activities, either short term or long term.

- 1) Type in the volunteer's name in the Quick Search box.
- 2) Click on the volunteer's name from the list that appears.
- 3) From the volunteer's Main tab, select the Miscellaneous.
- 4) In the Volunteer section select "Inactive" from the Status dropdown box.
- 5) Select a sort term or long term from the dropdown box
- 6) Save status.

7. Profile is archived by the administrator. (Office Staff)

Archiving a volunteer will remove any previous activity assignments and general interests from the profile.

- 1) Type in the volunteer's name in the Quick Search box.
- 2) Click on the volunteer's name from the list that appears.
- 3) From the volunteer's Main tab, select the Miscellaneous.
- 4) In the Volunteer section select "Archived" from the Status dropdown box.
- 5) Select a Reason from the dropdown box
- 6) Click Save.

13. Completed Activities are changed to Inactive Status.
--

Staff: BI Specialist

Details:

Completed activities or those no longer recruiting volunteers are changed to *Inactive* status. (BI Specialist)

Scheduled activities that have passed the last scheduled shift or reached their maximum number of allowed volunteers will no longer be visible to volunteers on MyVolunteerPage. Unscheduled activities that are no longer recruiting volunteers will remain visible to volunteers until they are deactivated by an administrator.

Each month, the administrator will remove the “active” status of the both scheduled and unscheduled activities that are completed or no longer seeking volunteers.

11. DRAFT URVC Photography Process for URVC Volunteer Projects, and Events

Objectives of the URVC Photography Process

- To increase the visibility of URVC and URVC “Volunteers in Action”
- To continue to build a URVC Photo Data Base
- To ensure photo release requirements involving URVC and URVC volunteers have been considered by URVC, and URVC partners.

URVC Volunteer Photo Release Permission

1. URVC will arrange to obtain a Photo Release per OGC guidelines from all URVC volunteers, other persons appearing in URVC “Volunteer in Action” project/event photos, including partner constituents, and/or partner agency personnel who would appear in the photo, if required.

2. Guidelines received from the university’s Office of General Counsel (OGC, Don Amundson, Senior Associate General Counsel (email to Judy Cox 9/14/20) are as follows:

For University colleges or units wishing to take photos or film on campus, the following [talent \(photo release\)](#) guidelines apply.

Classrooms, labs, and offices are private spaces. Citizens/the general public wouldn't be allowed in these spaces, so they are considered private. **You must obtain signed releases from individuals when filming or taking photos in these spaces.**

The hosting entity should provide permission for event photography or video. People have chosen to attend an event that is open to a wide audience, so individual permissions are not needed. **A best practice would be to include in the invitation that photos will be taken.**

For colleges or units filming or taking photos in public spaces on campus, talent (photo) releases are not needed.

Building lobbies, study areas, etc. are considered public spaces meaning citizens can enter the buildings and use those spaces. **Inform people when you are about to take their photo in case someone wants to leave [or does not want to appear in a photo].**

Outside of buildings are public spaces for the same reason. No release are needed. **Inform people when you are about to take their photo in case someone wants to leave [or does not want to appear in a photo].**

1. The URVC Photo Release Form will indicate Photos of URVC volunteers may be featured on the URVC website, in the UMRA Newsletter and other URVC promotional materials.
2. URVC will arrange for an URVC approved photographer to take URVC “Volunteers in Action photos and obtain the signed Photo Release forms.
3. The photographer will then send the signed photo release form to a designated URVC office staff member.

URVC Project/Event Intake (PI)

URVC partners (individual program or organization) will be asked to indicate on the *URVC Project Intake form* (PIF) whether a URVC representative will be allowed to take photos during the project or event.

A statement on the *URVC Project Intake form* (PIF) will indicate that photos, if allowed, of URVC volunteer experiences in the project or event may be featured on the URVC website, in the UMRA Newsletter and other URVC promotional materials.

URVC Better Impact Entry (BIE) Statement

When a URVC “partner” indicates on the URVC Project Intake Form that permission is granted for photos to be taken during a project or event involving URVC volunteers, a statement regarding that photo opportunity will be included by URVC office staff in the *Better Impact Entry Description---Post Assigned* section for the project/event.

ROLE OF URVC OFFICE STAFF: ANNOUNCED PROJECTS

1. Prior to disseminating an *Announcement* for a project or event, URVC Project Director will need to check the Project Intake information to determine if permission for photos to be taken has been granted by a project or event “Partner”.
2. If photo permission has been indicated, a URVC office staff member or Media Specialist will ensure this *photo opportunity* has been added to the *URVC Better Impact Entry* in the *Description-Post Assigned* section for the project/event .

ROLE of URVC CMC: URVC Photography Process:

1. The URVC Communications and Marketing Committee (CMC) will determine which projects/events are appropriate for assigning a photographer.
2. A designated CMC representative or Project Director will then contact the photographer to schedule the photo assignment.

3. The URVC assigned photographer will be supplied with a UMN approved Photo Release form which the photographer will then have signed by all persons who approve being photographed.
4. Volunteer Images are not subject to review or changes to be made for photo release approval once the Photo Release permission has been signed and/or declined.
5. If any person declines to have their photo taken and/or appear in URVC promotional materials, any such photo will be deleted from, or not appear in any URVC promotional materials.
6. Photos will be sent electronically by the photographer to the designated URVC e-mail address.
7. Each photo should be accompanied by a brief description of the image, e.g. *Packing Food Donations, or ESL student and tutor.*
8. A completed Photo Release for each person photographed needs to be scanned and e-mailed or postal mailed to the URVC office or designated URVC email address within 10 days after the photography assignment has been completed.
9. If URVC volunteer project/event photos are not received within 10 days after completion of the “photo shoot”, URVC office staff and/or a designated CMC member will destroy or permanently delete said photos from URVC files. **NO PHOTOS WITHOUT CORRESPONDING RELEASES WILL BE RETAINED.**

10. THE CMC or a designated CMC member will determine the usability of photographs based upon the following criteria:

Photo quality

Clarity,

Subject matter (appropriateness, naturalness, spontaneity, alignment to project/event purpose)

11. **If a photo is determined to be acceptable for use in media promos, a CMC member or URVC office staff member will “retitle” each photo for easier future identification.**

Photo Identification and Photo Release Storage

Photos will be identified *by project, event, program, month, and year* using 16 characters or less. This information can be included in the URVC photo digital section.

Examples:

2Harv3-20FoodSO=Second Harvest, March 2020 Food Sorting

MonW9-2-Kitc=Meals on Wheels, September 20, Kitchen Help Schakel

All photos will be stored in the URVC photography folder on the URVC shared Google Drive entitled: URVC Photos.

All Photo Release forms will be stored in the Release Forms folder on the URVC shared Google Drive entitled: URVC Photo Release Forms

URVC Staff will keep an office file (hard copy) to hold all completed Photo Release forms, and a record (electronic or paper) of correlating information such as *organization/project/event; the volunteer photographer, and the NEW file names of all corresponding photos* received and stored.

12. Office Staff Roles and Responsibilities

Project Director (Community Program Assistant 4912): Serves as information source and community contact person for a community program. Explains program to individuals and groups interested in program services. Identify projects appropriate for URVC affiliation.

- Arranges, attends, and reports on project-related meetings and activities. Leads discussion groups. Acts as liaison between agencies, organizations, and groups involved in projects.
- Assists in current and new project planning and development. Delegates new project identification efforts as needed.
- Delegates projects and tasks as appropriate.
- Conducts assessments of volunteer interests and needs. Surveys groups to determine needs and interests in collaboration with CMC.
- Assists in project administration, including purchasing; budget maintenance, report preparation, and program evaluation.
- Complete project intake forms as needed. Delegates Project Intake Forms (PIF) as needed.
- Give final approval for all new projects (i.e., approves the PIF form before sending out for announcement). Approve announcements for new projects.
- Organizes groups and volunteers. Coordinates events. Consults on volunteer training needs and requirements, assists in evaluating participants and educational programs.
- Coordinate training of URVC staff and Board members as needed.
- Assist the CMC in writing and editing publicity and information materials. Coordinate resources, including participating agencies, audio-visual aids, and library materials. Supports CMC regarding the existence of URVC throughout the UMN (e.g., newsletters, website, UMN Brief, CMC, UMRA blurb, etc.).
- Provides information regarding the URVC to other direct services at University or other locations.
- Decides all URVC operational issues, when needed in collaboration with Board Chair.

- Leads succession planning for URVC office/operations roles in collaboration with Board Chair.
- Receives training through external programs designed to employ and train people meeting specific eligibility requirements determined by program goals.
- May serve as lead workers of University staff but are not PELRA/Union supervisors.
- Incumbents may supervise student employees.

Office Manager (Administrative Manager 9341M1):

- Supervisory: supervise office staff, assign tasks, follow-up on deadlines, explain UMN policies and procedures: <https://regents.umn.edu/policy/all>
- Calendar: maintain calendar and schedule URVC Board meetings
- Meetings: lead regularly scheduled staff meetings
- Training: assigns staff to trainings as needed (in UMN system)
- Filing: maintain and create filing systems
- Data: gather and enter volunteer data in Better Impact
- Events: assist with event coordination
- Communications: assist CMC with communications
- Office supplies: manage office supplies, deliveries, and renovations
- Mail: sort, screen and distribute URVC mail and email

Office Staff (Administrative Associate 8208A1):

- Conduct volunteer intake using forms provided on Team Drive
- Follow-up with volunteers as needed
- Connect with volunteer organizations for updates
- Process URVC mailings
- Provide back-up support for URVC events

Better Impact (BI) Data Monitor (Supplemental Employee: Data Management Administrative Support 0001):

- Data: enter volunteer data into Better Impact and corresponding digital/hard-copy files
- Respond to inquiries: respond to inquiries via phone or email
- Update volunteer profiles in BI as required
- Generate BI reports for URVC Chair

Student Office Assistant (Student Services 2222; Administrative Associate 8208A1; or Administrative Professional 8463P2):

- Assist in the development and deployment of URVC photography process to include creating and maintaining URVC Photo Library database; responsibility for issuing and collecting Photo Releases and maintaining paper copy file for Photo Releases
- Become competent in Better Impact Volunteer Management System application so as to assist URVC Better Impact Specialist and volunteer requests as needed
- Respond to volunteer, and/or agency, inquiries via phone or email. Enter new volunteer contact information in Google Team Drive and provide weekly summary of same to Office Manager for URVC follow up with volunteers
- Assist in designing, creating, and disseminating URVC e-newsletter. Develop and maintain a tracking system and database for URVC publications
- Assist in developing and maintaining a database of UMN academic and service unit deans, directors, and coordinators
- Assist with URVC website updates.
- Assist in URVC communication development as requested by CMC or URVC Media Specialist which may include writing copy for URVC print and digital publications and URVC social media posts.
- Sort, screen, and re-direct URVC e-mails as directed by standards/guidelines provided.
- Process URVC mailings as requested
- Attend URVC Board of Directors and CMC meetings upon request
- Other duties as assigned
- Must have work-study funds

Qualifications:

- University of Minnesota undergraduate or graduate student
- Proficiency in MS Office Suite (Word, Power Point, Excel), Google Suite, Zoom
- Must have work study funds for 2020-2021
- Must be available PT during summer months

Preferred Qualifications:

- Experience using graphic design software
- Education focus related to Communications and Marketing, Business Management, and/or related disciplines
- Experience with non-profit organizations

Financial Manager/Treasurer (Principal Accounts Specialist 1858):

- Compile information for financial reports. Perform basic data analysis as needed.
- Prepare, process and maintain student payroll and related documents.
- Assist with budget preparation activities such as data entry into financial accounting system for budget preparation and year-end closeout.
- Complete documents and verify/reconcile for accuracy.
- Perform account activity such as accounts receivable and/or account payable functions: prepare orders, enter transaction, process invoices and deposit receipts.
- Establish and maintain manual/computerized files and general reports. Record maintenance.

- Provide basic information regarding accounts policy and procedure.
- Identify, review and resolve accounts transaction problems.
- May assist with informal orientation and training of other employees on office procedures.

Qualifications: Certified Accountant with 3 years EFS experience at UMN and current EFS access and approvals.

Media Specialist (8341G; Communications Generalist 9703CG):

- Write and edit original, interesting and persuasive stories with a focus on people-centered narratives that convey complex ideas and processes for a general audience.
- Write and/or edit copy for URVC print and digital publications, including the monthly URVC Spotlight column; URVC fact sheets, brochures, and newsletters; URVC web pages; URVC social media posts; and URVC announcements for publication in University media.
- Use photos, video and other digital content tools in storytelling and help colleagues develop their multimedia skills. Arrange photo shoots of URVC volunteers in action as needed for use in URVC print and digital publications, website, and social media.
- Take photos [or arrange for photographer to take photos?], obtain signed Photo Release forms, give photos and forms to Office Specialist for entry into URVC Photo Library database.
- Enter URVC photos, photo descriptions, and signed Photo Releases into URVC Photo Library database, and maintain paper copy file for Photo Releases.
- Enter signed URVC Information/Author Releases from people who are profiled or otherwise featured/included in URVC publications into release database and maintain paper copy file.
- Build relationships with community influencers and networks
- Coordinate editorial planning with communications colleagues in the URVC.
- Use metrics to evaluate and report on stories' reach and impact.
- Track dissemination and inventory of URVC publications (fliers, brochures, fact sheets, postcards, newsletters, etc.), entering data into the dissemination and inventory database on materials taken by URVC staff and disseminated, and quantities remaining in stock. Re-order URVC publications stock as needed by URVC staff.
- Manage social media channels for URVC.
- Manages and provides oversight for URVC website, including delegation of website tasks/changes to URVC staff and/or appropriately trained volunteers.
- Create reports, factsheets and presentations for project leaders.
- Meet or exceed University and Extension branding and accessibility requirements.
- Attend regular URVC meetings.
- Provide technical assistance to staff using technology to deliver online/remote education.

- Participate in CMC and work groups that enhance the recruitment, retention, and engagement of participants and partners.
- Align with federal program policies for technology and social media and with University of Minnesota policies and requirements.
- Maintain knowledge of relevant research.

Qualifications:

- Bachelor's degree in communications, marketing, writing, journalism, or related field or a combination of related education and work experience to equal at least four (4) years.
- Excellent writing and interviewing skills
- Demonstrated experience creating high-quality multimedia including photography, video filming and editing, PowerPoint, infographics
- Experience managing organizational social media sites
- Ability to work independently as well as in a group setting
- Ability to interact effectively with diverse groups of people, and demonstrated commitment to equity and inclusion
- Experience working with diverse limited-resource audiences and the agencies that serve them

Part IV: Technology Basics

13. Navigating Better Impact – Office Staff

Assigning volunteers to a scheduled activity:

- In the search box, type in the volunteer's name.
- In the menu under the volunteer's name, click the "Assign" tab.
- Scroll down the projects and click the link to the correct activity.
- Scroll down to Date, check the "As" (assigned) box for the desired date and shift.
- Click the "save" button.

Assign volunteer to an unscheduled activity:

- In the search box, type in the volunteer's name.
- In the menu under the volunteer's name, click the "Assign" tab.
- Scroll down the projects and click the link to the correct activity.
- To assign the volunteer to the activity, click on "Assigned" button.
- Click "Save" button.

Monitoring Volunteer Profiles:

Administrators (URVC Office) do not receive notification of changes made by a volunteer to contact information or general interest preferences. Using Better Impact to create phone and email lists and to send out project announcements, will ensure the most current volunteer information is used.

Required information is:

1. First and Last name.
2. Email address.
3. Mailing address.

4. Phone number.
5. General interest preferences.

Administrators may remove files (e.g., move, resignation) or change to inactive status temporarily (e.g., “Snow Birds”) or archive a volunteer’s information.

Navigating Better Impact as a Volunteer

Access: Go to: <https://urvc.umn.edu/get-started>

Enter: A Username and Password

Click the My Profile-Contact Information tab (on extreme right) to access:

Contact Information: Enter your contact information. Click Save. Review and complete these options:

- Add Photo: Click “Add Photo” to select and upload a photo from your computer’s photo library. Follow prompts.
- Privacy Settings: Review and select desired options. Click Save to activate selected options.
- Subscriptions. Sign up to receive a weekly email message reminder of the volunteer activities you are signed up for in the coming week.

Use the pull-down menu under My Profile to access:

Interest: Select the activity categories in which you have interest in volunteering. Click Save.

Qualifications: Indicate times during a typical week when you are available to participate in a volunteer activity. Click Save.

There are additional options on the My Profile menu which you may wish to explore and select. Next, continue on to access the other pages listed in the main (horizontal) menu.

Home: An introductory page with your name, photo (if you have provided one) and a list of the activities you have signed up for.

Opportunities: Lists activities needing volunteers. Projects are arranged in general interest categories. Scroll down to see full array. Click on activity title for complete project information, or the white circle with an “I” for brief project description. Scroll down to see a list of various shift times.

Select projects you wish to volunteer for. To sign-up for shifts, click on the faint square at the extreme right margin to select a specific shift. Scroll down to bottom of that set of options and

click on Signup for Selected. If sign-up has been successful. Click the portrait silhouette for that project/shift to see if your name shows up.

Schedule: Displays your selected activities. Click view calendar to view as a calendar page.

Hours: Summarized number of hours volunteered. Enter hours under Recent, Active, or Inactive. Remember to enter hours weekly or at least by the end of each month.

Contact: This page identifies the people who staff the URVC office and provides a link for contacting the office by email. If you have problems navigating Better Impact site, please contact the URVC office at either URVC@umn.edu or 612-625-8016.

14. Working with the URVC Team Drive

My Drive = Office Desk Drive

Accessible to office staff only. Use for archives and internal office use.

Shared Drive = Team Drive.

Accessible to anyone on the list. Created by Jenna Pleschek (original owner). Use for recent and on-going work (within current calendar year).

How to Upload Files to Team Drive

1. Go to Team Drive, click “New” on the left-hand side.
2. Click “File Upload” and it will give the desktop file.
3. Select the file you want.
4. Click “open” and it will upload to Team Drive.
5. Move the file into the “Current Projects” folder. (PROJECTS > CURRENT PROJECTS)

BI Project Categories: (Note: Each of these has several subcategories)

- Assisting the Disabled (AD)
- Community Assistance (CA)
- Educator (EDU)
- Environment (Env)
- Evaluation (Eval)
- Event Assistance (Events)
- Medical (Med)
- Office Administration (OA)
- Social Welfare (SW)
- Stay-at-Home (SAH)
- Tax Preparers (TP)
- University Projects (UP)
- Usher/Greeter (UG)

Process:

1. Download document to desktop.
2. Save in appropriate folders on desktop.
3. Upload copy to appropriate folder on Team Drive under Projects.
4. Maintain standardized labeling:

Document Name__Category__Year

15. Monitoring the URVC Website

<http://urvc.dl8.umn.edu/>

The URVC site is managed under T2: “VCSH” (Video Collaboration Storage Hosting).

The link to find Drupal Consultants:

<<https://it.umn.edu/drupal-consultants-available-through>>

They recommend contacting Origin Eight and Electric Citizen because they have the most experience with our platform. Ten 7 Interactive and Nighthawk Marketing have some familiarity as well.

For further assistance see: <https://it.umn.edu/technology-help-our-staff>

DRUPAL:

The site is set up in Drupal Lite (version 8).

IT assistance is available from 1-HELP.

Training for Drupal is available from: <https://it.umn.edu/technology/drupal>

Projects to highlight: Go through current projects and arrange to take photos to upgrade to more recent photographs.

Bi-Annual Updates: Make changes and updates at least twice a year. Get input from Board.

Part V. Common URVC Project Categories

Historically, the URVC used “low tech” three-ring binders to track volunteers and their activities. This process is no longer the primary method for tracking volunteers post-Better Impact (2018). However, since these records are being kept in the office it is helpful to know how they were used and why.

Project Folders

Each 3-ring binder contains fillable forms to complete with information on the volunteer opportunity and the volunteer’s information. Forms are located in the office shelves by category.

Project Categories include the following examples:

16. Tutoring

Reading -- MN Literacy Council, Murray Jr. H.S.

Math --- Murray Jr. H.S.

17. Ushering/Greeters

Rarig Center --- Music, Drama

Vocal Essence --- Choral

18. Health/Research

Medical --- Research Projects

19. One-Time/On-Going

Harvest Bread --- Packaging, Delivery

Mock Trials --- Judging

General Instructions:

New project forms are in boxes on the shelf next to phone books. There are 5 types of projects: One-Time; On-Going; Ushering; Research, and Tutoring. There are four 3-ring binder books, one for each project type, except for Tutoring (in a manila folder). If you take a request for a project get all the information needed to fill out the form so the office staff will explain it to volunteers. Place it in the appropriate book. The projects should be kept in chronological order

with the current ones in the front.

A paper clip at the top of a project form means the project is not completed and calls are still to be made. When you file a new project place a paper clip on the page top and note this in the daily journal.

Volunteer Prospects for a Project:

There are project categories to fit types of projects (See People Resources Number Codes on wall. E.g. 01 Bloodmobile Support).

Each volunteer has chosen types of projects for which to be contacted. We have print-outs of volunteer names and phone #s for each category (and Email lists). These print-outs are in Better Impact data base. When a project is created the appropriate call list(s) should be placed behind the project form in the 3-ring binder. You can print out a list by selecting the category # in the “volunteer” data base

Appendix

UNIVERSITY OF MINNESOTA RETIREES VOLUNTEER CENTER

BY LAWS

The Center will be served by a Board of Directors, comprised of no less than eleven (11) persons, broadly representative of University of Minnesota retired employees.

BOARD MEMBERSHIP

Members of the Board will be recommended by a Nominating Committee appointed by the Chair of the Retirees Volunteer Center. Recommendations will be voted on by the Board of Directors. The term on the Board shall be three (3) years. In case of resignation or non-fulfillment of duties, members will be selected to fill less than full terms in a pattern of staggered term expirations. Mid-term vacancies will be filled by the Chair of the Board of Directors. Persons invited to Board membership will be apprised of the concept of a "working Board" which includes the expectation of service on the part of all Board members.

The Board of Directors will be responsible for establishing policy, program objectives, and planning procedures for the Center. It will adopt an annual budget, evaluate the program periodically, and issue an annual report to the Board of Directors of UMRA and to the President of the University on the Center's accomplishments and financial status. The Board will establish office personnel policy.

The Board of Directors will meet regularly in the months of January, March, May, July, September and November. The Executive Committee, composed of the Board's elected officers, shall act on behalf of the Board on all matters between the regular Board meetings. A quorum of the Board will consist of eight (8) members. The fiscal year will be from July 1 to June 30.

OFFICERS

Officers of the Board of Directors shall be Chair, Vice Chair, Secretary and Treasurer. The Board may have co-chairs. Any reference to the "Chair" can refer to Co-Chairs.

OFFICER ELECTIONS

The Chair of the Board of Directors shall appoint a Nominating Committee of three (3) members of the Board to recommend persons to serve as officers in the ensuing year. The Nominating Committee shall report at the first meeting of each fiscal year, at which time the election of officers shall occur.

CHAIR

The Chair shall preside over meeting of the Board of Directors of the Center and meetings of the Executive Committee, attend the monthly meeting of the Board of Directors of UMRA and represent the Center in contacts with the central administration of the University and outside organizations.

The Vice-Chair shall serve in the absence of the Chair.

The Secretary shall keep minutes of the Board actions.

The Treasurer shall oversee disbursement of project funds and prepare bimonthly fiscal statements for the Board.

COMMITTEES OF THE BOARD

The following committees will be established.

An Executive Committee consisting of the Chair of the Board of Directors, the Vice Chair, the Secretary and the Treasurer. The Chair may ask the immediate past Chair to serve on the Executive Committee. The Executive Committee is authorized to act on behalf of the Board of Directors in matters requiring action between regularly schedule meetings.

A Communications Committee whose responsibility shall be publications, including the Center newsletter, publicity and orientation of prospective University retirees regarding the Volunteer Center.

A Project Committee whose responsibility shall be to initiate projects and to receive new requests from organizations within and outside of the University. It shall recommend to the Board of Directors the feasibility, priorities and procedures for developing such projects.

An Office Management Committee whose responsibility shall be to establish procedures and coordinate the activities of volunteers serving the Center at the University and in the community, will assume responsibility for the collection and maintenance of appropriate data and for generation of needed reports.

A Nominations Committee whose responsibility shall be to recruit members for the Board of Directors as well as to recommend officers.

Members of committees shall be appointed by the Chair, with the approval of the Board of Directors, each fiscal year. Other committees may be appointed as deemed necessary.

AMENDMENT OF THE BYLAWS

These bylaws may be amended at a regular ~~monthly~~ meeting of the Board of Directors by approval of an absolute majority of the members.

Members must receive written copies of the proposed amendments at least ten days prior to the meeting at which the vote is taken.

GUIDELINES FOR ADOPTING VOLUNTEER PROJECTS

1. The location should be in a safe area and should be accessible to volunteers (bus or with parking for cars). Daytime activity is preferred although well-organized public events in the evening such as concerts can be appropriate. Activities in the volunteer's "home are" are often preferable.
2. The sponsor should be a non-profit organization.
3. The activity should typically take place in a "public place", e.g., a church, library, community center, school or college, as opposed to a private residence.
4. The activity should be chosen to fit the profile of our active group (interests, required skills/knowledge, availability). This profile should be made explicitly so we could evaluate the degree to which we are matching it.
5. The activity should be well defined (time, place, what is involved, who is in charge, who can provide help, required training, required skills, duration expected, etc.).
6. We should emphasize volunteer efforts that directly relate to or are in support of one or more of the following themes (broadly defined): Education/Learning/Teaching; The Arts; Nature/Environment; Organizational Support.
7. We should seek to maintain some general proportionality among our priorities, e.g., 70% University; 20% a few selected organizations; 10% community at large (based either on hours of effort, or numbers of activities, or numbers of volunteers).
8. We should avoid volunteer activities that are strongly partisan in character.
9. We should avoid individual projects that would require disproportionate use of our resources.
10. Guidelines should be reviewed annually or as necessary to make sure they are accomplishing their purpose and are realistic and usable.

Further Recommendations of the Data Base Task Force

1. A data base of active volunteers should be established and kept current.
2. An attractive brochure describing the Project should be sent to all new or prospective retirees including an invitation to call or return a form.
3. Nine months after the this mailing there should be a follow up card or phone call to non-respondents.
4. Every issue of the Retiree Association Newsletter should contain a brief invitation to become a volunteer by contacting our office.

Adopted 9/93

POLICIES ON LIABILITY

General Findings

1. In providing volunteer services to units of the University, URVC, the Committee of Management, and volunteers are covered by the indemnification and Defense Policy adopted by the Board of Regents, 8 March 1985 (Policy Book, 8 March 1991).
Conditions: good faith, good intentions, timely application for defense.
2. Volunteers are not in great hazard of accidental or malicious injury while engaged in activities of kinds so far undertaken. The practices that the Project Manager has evolved in undertaking, organizing, and carrying out services—practices pointed up in the “Guidelines” adopted don 22 March 1994—constitute effective risk management. Prudence and forethought regarding such matters as auto insurance, dark streets, and concealment for lurkers in parking ramps remain indispensable.
3. As URVC may expand its reach and enter new activities, the first three of the following particular concerns will call for especial mindfulness of Murphy’s Law. Provided that the committee members and the Project Manager all take it upon themselves to ask, persistently, “What are the things that can go wrong here?” then perhaps there will be no need to name one member or more to a standing committee.

Particular Concerns

1. Allegations of discrimination or insensitivity in respect of race, sex, age, or ethnicity.
Risk control measures: Screening and briefing of volunteers.
2. Allegations of malfeasance, misfeasance, or malpractice could arise in any undertaking which requires the exercise of professional, scientific, technical, artistic, or academic capacities. (Elder mentors are the principal current instances; for literacy counselors, the burden would shift to the Minnesota Literacy Council.)
Risk control measures: Screening, job descriptions, training, performance reviews.
3. Allegations of abuse to vulnerable clients (children, the infirm).
Risk control measures: Screening, job descriptions, training, performance reviews, so far as burden is not shifted to another institution which provides the setting of the client-contact.
4. Allegations of violation of the Data Privacy Act.
Risk control measures: Very unlikely to occur if “Guidelines” are followed.
5. Allegations of violation of Open Meeting Law.
Risk control measures: Most unlikely to occur. Law applies to Board of Regents, not to the councils of departments, and much less to committees of semi-attached adjuncts.

(Recommendations based on advice from William Donohue, University’s Office of General Counsel. Adopted October 1994.)

UNIVERSITY OF MINNESOTA RETIREES VOLUNTEER SERVICES PROJECT

MISSION

In a cooperative venture of the University of Minnesota retirees and the University, the volunteer Services Committee is formed to provide opportunities to use their knowledge, skills and interests in volunteer service and to maintain a University identity with agencies serving the community.

OBJECTIVES

1. To assemble organize and disseminate information to University retirees about opportunities for volunteer service.
2. To encourage retirees and spouses to volunteer.
3. To provide information on volunteer opportunities to soon to retire University staff as a component of their retirement planning.
4. To conduct a referral service for retirees and for agencies seeking volunteers.
5. To publicize the volunteer program through appropriate media.
6. To conduct a recognition program that enhances each volunteer's sense of personal accomplishment and contributes to the visibility of the program in the University and the community.
7. To assess outcomes of the program and report periodically to the University of Minnesota Retirees Association and to the University community.
8. To determine retiree population needs and interests.
9. To provide opportunities for service that are rewarding to the retiree volunteers.
10. To seek opportunities rather than merely react to requests.

Adopted 9/22/87

URVC Project Intake Information Form (PIF)

- Description of event (with brief summary of agency's mission)
- Link/access to any electronic or additional information re. event (promos, recent fliers, brochures, etc.), specifically including any link(s) to required online volunteer registration.
- Organization's name and website/URL (if university, incl. dept. name)
- Pre-event agency contact information, including e-mail and preferred phone # (for URVC use)
- Contact during event (for volunteers use)
- If human participants in a university research project then
 - Principal Investigator contact info.
 - IRB number
 - HIPAA requirements (if any) e.g. participant confidentiality,
 - Volunteers to reply directly to the PI, someone else or to URVC in order to register for the project?
- Number of volunteers needed (minimum and maximum)
- Dates, times (included length of shifts) and locations
- Description of volunteer duties
- Volunteer eligibility and training requirements
- Physical expectations/limitations
- What to wear (or not to wear)
- Volunteer compensation?
- Event location specifics: address; room/workspace; cautions re. access (construction. road closures, building access restrictions; etc.)
- Parking/Transportation/Safety information
 - NOTE: For UMN campus venues, free parking vouchers are often provided to our volunteers. Will your organization be able to provide these?)
- Information required to register, if other than standard roster info
- Volunteers food/beverage availability: provided- complimentary? vending/restaurants near by (if shifts longer than a few hours)
- Photos for URVC use on our website and/or in our promotional materials
 - Are photos allowed at the volunteer project location?
 - No
 - Yes
 - If yes, then what restrictions or guidelines (if any) will we need to follow?
 - Would your organization be willing to share photos they take during URVC volunteers' participation in your event?
 - No
 - Yes
- Deadline for volunteer application
- Deadline to publish announcement
- Date to remove this event from URVC active volunteer opportunities
- Name and expected date of other events (one-time or ongoing) that you anticipate wanting URVC volunteers in the next 12 months

Return completed form to Eric Hockert at ehockert@umn.edu