Recordkeeping and Reporting Procedures for Volunteers

County Salary Ordinance and Volunteer Insurance Program
The County Salary Ordinance (Ord. No. 440) allows County agencies and departments to establish volunteer programs or have individual volunteers. A volunteer is a person who performs authorized voluntary service to the County, without pay, and in aid of a recognized County purpose. The ordinance also sets forth requirements for enrolling volunteers, recordkeeping, and reporting. In addition to the ordinance, agencies and departments have responsibilities under the Volunteer Insurance Program. The information below explains how agencies and departments fulfill these responsibilities.

The Salary Ordinance requires agencies and departments having a volunteer program or individual volunteers do the following:
- Maintain a roster for enrolling volunteers and recording their hours worked each month.
- Submit the volunteer roster quarterly to the Human Resources Department.
- Submit a monthly report to the Human Resources Department summarizing the hours worked by all volunteers.

The Volunteer Insurance Program requires County agencies and departments having a volunteer program or individual volunteers do the following:
- Have volunteers complete an application.
- Have volunteers sign an acknowledgement form regarding the Volunteer Insurance Program.
- Provide volunteers a brochure for the Volunteer Insurance Program.
- Submit a copy of the volunteer application and Volunteer Insurance Program acknowledgement form to the Human Resources Department for newly enrolled volunteers.

Agencies and departments also have responsibilities under Background Check Board Policy C-33, though that is not covered in this document.

Roster and Quarterly Report
Agencies and departments must maintain a roster for enrolling volunteers and recording the number of hours worked each month. The roster must be submitted to the Human Resources Department by the 15th day of the following months: January, April, July, and October. Agencies and departments must also submit the roster anytime it is requested by the Human Resources Department. Submit the roster as an Excel spreadsheet and email it to volunteer@rc-hr.com.

A roster template is available at http://rc-hr.com/HRToolbox/Volunteers.aspx. The roster must contain the following information for each active volunteer and volunteers whose enrollment was terminated within the past three years:
- Name
- Date of Birth
- Address
- Telephone
- Enrollment Date
- Termination Date (for volunteers whose enrollment has terminated)
• Assignment Location
• California Drivers license number, class, and expiration date (for volunteers authorized to drive)
• Auto Insurance company name, policy number, and expiration date (for volunteers authorized to drive)
• Number of hours worked by month

In addition to the above information, the roster should include the name of the agency or department and contact information for the person responsible for maintaining the roster.

Monthly Hours Report
Agencies and departments must create a report each month summarizing the number of hours worked by all volunteers. The report must be submitted to the Human Resources Department by the 15th day of every month. Submit the report as an Excel spreadsheet or in the body of an email, and email it to volunteer@rc-hr.com.

The report must contain the following information:
• Total number of hours worked by all volunteers (Provide one total for all volunteers. Do not provide the name of each volunteer.)
• Total Number of Volunteers
• Total Number of Volunteers Newly Enrolled During the Month
• Total Number of Volunteers Terminated During the Month

In addition to the above information, the report should include the name of the agency or department and contact information for the person responsible for submitting the report.

Submitting Copies of Applications and Acknowledgement Forms
Volunteers are not covered by workers compensation insurance or County self-insurance for injury or accident arising out of volunteer service. Instead, the Volunteer Insurance Program provides coverage for volunteers in the areas of Excess Medical, Excess Volunteer Liability, and Excess Automobile Liability. Each of these coverages is in excess of the volunteer’s personal coverage. For questions about coverage and claims or to report injuries, please contact Risk Management.

Agencies and departments must have volunteers complete an application and an acknowledgement form for the Volunteer Insurance Program, and provide volunteers a copy of the Volunteer Insurance Program brochure. Visit http://rc-hr.com/HRToolbox/Volunteers.aspx for application and acknowledgment forms and the Volunteer Insurance Program brochure.

Agencies and departments must also submit to the Human Resources Department a copy of each newly enrolled volunteer’s application and acknowledgment form, and include contact information for the person responsible for submitting these forms. Submit the forms by interoffice mail to the Talent Management Division, Mail Stop #1081. Do not submit the forms to Risk Management.

Records Retention Requirement
The Salary Ordinance requires that agencies and departments retain volunteer-related records for a period of three years from the date the volunteer’s enrollment is terminated. Agencies and departments may have other record retention requirements under Board Policy A-43 (RMAP).
Questions
Please contact the Human Resources Department’s Talent Management Division for questions about these recordkeeping and reporting requirements. For questions about the Volunteer Insurance Program, including coverage and claims or to report injuries, call Risk Management.

Talent Management Division
Human Resources Department
Mail Stop #1081
volunteer@rc-hr.com
(951) 955-3549
http://rc-hr.com/HRToolbox/Volunteers.aspx

Risk Management
(951) 955-3540

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