









# Texas A&M AgriLife Extension Service Extension Volunteer Standards Rules & Guidelines 2023-2024

Table of Contents		
Purpose	2	
General Guidelines	2	
Volunteers That Require Screening	2	
Types of Volunteers	2	
Overnight Chaperones	3	
Background Check Vendor & Required Information	5	
6S6c6reening Timeline & Processing	6	
Screening from Other Entities	6	
Confidentiality	6	
Volunteer Status Determination Process	7	
Reassignment of Volunteer Status	8	
Grievance Procedure	8	
4-H Volunteer Screening Procedures	9	
Volunteer Online Forms	9	
Re-activating 4HOnline Profiles	9	
AgriLife Extension Employee Profiles	9	
Screening Cost and Payment Options	10	
Creating an Invoice for Payments by Check	10	
Final Approval of 4-H Volunteer Applications	11	
Follow Up to Screening	11	
Screening Summary Reports	11	
Non-4-H Volunteer Screening Procedures	12	
<b>NEW!</b> Volunteer Applications – General Overview	12	
<b>NEW!</b> Extension Volunteer Standards Application System Database	14	
NEW! AgriLife Course Payments	15	
NEW! AgriLife Learn: Volunteer Training Course	16	
<b>NEW!</b> Sterling Volunteers Login and Background Check Process	16	
NEW! Follow Up to Screening	17	
NEW! Screening Summary Reports	17	
Appendix Listing	18	

#### **Purpose**

Extension Volunteer Standards is committed to providing a safe environment for everyone involved in AgriLife Extension programs including our clientele, our volunteers, our employees, and the agency as a whole.

Note. The Extension Volunteer Standards (EVS) was previously known as Youth Protection Standards (YPS). This rebranding was introduced in August 2022. Youth safety still remains a high priority, however our screening process is broader than only youth safety. We include all Extension volunteers, even those who do not work with youth. This rebranding more accurately reflects all AgriLife Extension volunteers.

#### **General Guidelines**

#### **Volunteers That Require Screening**

- All direct volunteers, Master Volunteers, volunteers with full supervisory responsibilities of youth at an Extension program, and volunteers who handle Extension support group finances (including, but not limited to Leadership Advisory Boards (LAB), Program Area Committees (PAC), Texas Extension Education Association (TEEA), task forces, coalitions, etc.) must be screened through the Extension Volunteer Standards (EVS) Program.
  - a. For clarification, this does NOT mean that all of your LAB, PAC, TEEA, task force, or coalition members must be screened. This means any volunteers who meet the definition of a direct volunteer or those who are handling funds should be screened.
  - b. Indirect and episodic volunteers are not required to be screened through EVS. See Attachment A for additional details.
- 2. Initial screening of a volunteer is conducted when he/she applies for a volunteer role with the Texas A&M AgriLife Extension Service. Volunteers must be screened, complete required trainings, and approved by the county program prior to fulfilling any volunteer roles.
- 3. Re-screening of all Extension volunteers is conducted every three years from the volunteer's most recent screening. Note:
  - a. 4-H Volunteers: Screening is determined on a 4-H program year basis. For example, a volunteer screened any time during the 2023-2024 4-H year (between September 1, 2023, and August 31, 2024, also considered "4-H Year 2024") needs to be re-screened at the beginning of 4-H Year 2027 (September 1, 2026 through August 31, 2027). 4-H volunteers must re-apply annually through 4HOnline and complete all required steps including the application fee and trainings.
  - b. Non-4-H Volunteers: Screening is determined on an actual, calendar year basis. Screening is valid from the date of screening for three years.

#### **Types of Volunteers**

#### 1. Direct Volunteer

- a. A direct volunteer is any adult who meets all the following criteria:
  - Provides unpaid support for Extension through face-to-face contact.
  - Provides a learning experience for adults or youth within Extension.
  - Has an individual volunteer application on file with the appropriate program area.

- Has a position description on file. General descriptions are acceptable.
- Has passed a criminal background check within the past three years.
- Has completed the required trainings to be an AgriLife Extension volunteer.
- Pays the volunteer application fee.
  - 1. 4-H volunteers submit an annual application fee of \$10 through 4HOnline during re-enrollment.
  - 2. **NEW!** Non-4-H Volunteers submit an application fee of \$12 through the AgriLife Learn platform prior to completing their training and criminal background check.
- b. Master volunteers are considered direct volunteers.
- c. Direct volunteers must pass their criminal background check, complete necessary training, pay their application fee, and have their application approved at the county level before fulfilling any volunteer duties for AgriLife Extension.

#### 2. Indirect Volunteer

- a. An indirect volunteer is any adult who meets the following criteria:
  - Provides unpaid support for Extension programming without having direct contact with Extension clientele (youth or adults).
  - Does not have face-to-face contact with youth or adult clientele.
  - Does not provide learning experiences for youth or adult clientele.
  - Examples of indirect volunteers may include but are not limited to a board member or committee member, a livestock show board member, or a parent accompanying their own child(ren) to an event who does not serve in a volunteer capacity, or a donor/sponsor.
- b. Indirect volunteers are not direct volunteers and are not required to pass a criminal background check to be an indirect volunteer.

#### 3. Episodic Volunteer

- a. An episodic volunteer is any adult who meets the following criteria:
  - Provides unpaid support for Extension programming for a single event.
  - Does not have supervisory duties of youth at an Extension program.
  - Assists with an Extension program while direct volunteers and/or employees are present.
  - Has a specific task to perform for a specific event or program.
  - Examples of episodic volunteers may include but are not limited to an interview judge at a 4-H event, guest speaker at a meeting or event, or assistant at a 4-H contest.
- b. Episodic volunteers are not direct volunteers and are not required to pass a criminal background check to be an episodic volunteer.

#### **Overnight Chaperones**

- 1. Individuals who are driving youth or chaperoning youth for overnight events (must be at least 21 years of age) are considered direct volunteers with full supervisory responsibilities and must be screened and cleared through the Extension Volunteer Standards Program prior to serving as a volunteer. They must also complete required trainings, submit the application fee, and have final approval by their local County Extension Agent(s).
- 2. Examples: Texas 4-H Roundup Chaperone, a driver to Texas 4-H Teen Retreat, helping lead a workshop at Texas 4-H camp, 4-H Club Manager, Livestock Mentor, 4-H project leader, Master Volunteer, or Shooting Sports Leader.

- 3. The guidelines below are best practices and should be followed to the fullest extent possible.
  - a. There should be at least two adults aged 21 or older, with at least one adult representing the gender of the participants, if possible.
  - b. The adult to youth ratio should be at least 1 adult per 8 youth.
  - c. There should be no one-to-one contact of adults and youth, unless in full view of other youth or adult participants.
  - d. Plan ahead.
    - i. Inform participants and parents/guardians regarding the type of lodging (hotel, dorm, etc.).
    - ii. Make rooming assignments before leaving for the event.
    - iii. Share rooming assignments with every participant and parent/guardian before leaving.
    - iv. Seek consensus and resolve any concerns about rooming assignments prior to departure.
    - v. No participant will be required to sleep on the floor.
    - vi. For an adult to stay in the same room with a non-family member youth participant, there must be a minimum of three persons in the room.
    - vii. No youth and adult may share a bed, unless there is a familial relationship.
    - viii. Adult volunteers or chaperones must respect the privacy of youth members in situations such as changing clothes and taking showers and intrude only to the extent that health and safety require.
    - ix. Adults must protect their own privacy in similar situations.
  - e. Make a contingency plan. Pre-departure plans can change for many reasons including changes in previously reserved or provided amenities or conflict between 4-H members. If the situation changes upon arrival at the lodging facility, encourage the youth participants to provide input on the new plan. Call, text, or attempt to notify parent/guardian of changes. Below are some possible solutions when rooming plans change:
    - i. Ask 4-H members to voluntarily change room assignments. [CAUTION: Be sure new rooming arrangements are not made or perceived to be made on a prohibited basis].
    - ii. Ask the hotel for a rollaway bed.
    - iii. Ask the hotel for a suite with a pull-out couch.
    - iv. Ask the hotel for adjoining rooms.
    - v. Find a different hotel that can meet your needs.
  - f. It is the responsibility of the overnight chaperones to supervise all aspects of youth rooming assignments including discipline, curfew, clean-up, and other guidelines established during the event.
  - g. Room checks should be conducted each night. It is the responsibility of the overnight chaperone and the staff to ensure that all youth are in their assigned rooms.
  - h. When transporting youth to and from planned 4-H sponsored events, individuals must meet at designated departure time(s) and location(s) as planned by the adult chaperone. If you cannot provide two adults for each vehicle, the minimum requirement is one adult and two or more youth members.
  - i. When appropriate, maintain communication with parents.

#### **Background Check Vendor & Required Information**

- 1. Background checks are conducted by Sterling Volunteers, a national leader in background checks for both employment and volunteer work.
- 2. Extension Volunteer Standards has contracted with Sterling Volunteers for the Basic Criminal History Record Locator Search. It ONLY includes Government Watch List Search (OFAC), DOJ Sex Offender Search, and National Criminal History Search. It also includes monthly monitoring for a year of the national criminal history search and sex offender registry.
  - a. Note. A volunteer must agree to the consent form before the background check can be conducted. There is a standard consent that Sterling Volunteers uses for all background check packages. The consent indicates that the report may include credit reports, educational information, and additional background information. AgriLife Extension Volunteer Standards DOES NOT see that type of information. Only the searches listed above in the Basic Criminal History Record Locator Search are shared with Extension Volunteer Standards.
  - b. Volunteers are able to log into their Sterling Volunteers' account at any time to see their information. The Extension Volunteer Standards office is provided the same report that a volunteer can view on their profile by clicking on the "badge" located in the My Organizations section on their Sterling Volunteers account profile.
- 3. Sterling Volunteers' online form will collect the private, personal information for the background check. It will not be stored in 4HOnline, the Extension Volunteer Standards database or in any AgriLife Extension records. Screening will begin immediately once the form is submitted.
- 4. The information required for the background check includes: first, middle, and last names; suffix; date of birth; social security number; gender; phone number; email address; address and how long the applicant has lived at that address; and the consent.
- 5. If a volunteer has previously had a background check conducted by Sterling Volunteers that is still valid, the volunteer may "share" their background check with AgriLife Extension through the Sterling Volunteers platform.
- 6. Go to the website: https://app.sterlingvolunteers.com
  - a. Login with your existing Sterling Volunteer credentials.
  - b. In the bottom right corner, under the My Screening Checklist, click the orange text, "Find organizations and share my background check."
  - c. In the Filter section, type the zip code 77845 (College Station).
  - d. In the Organization Name section, type <u>Texas Master Volunteers</u> or <u>Texas A&M</u> AgriLife 4-H.
  - e. Click the orange Search button.
  - f. In your search results, you should find <u>Texas Master Volunteers</u> or <u>Texas A&M</u>
    <u>AgriLife 4-H</u> with the email address of Ihuebinger@ag.tamu.edu, phone number of 254-974-9027, and the city of College Station.
  - g. Click the Share Screening button. You will only be able to share your background check if it is still current.
  - h. See this video for a screen recording and instructions about the process of sharing your existing background check report through Sterling Volunteers: https://www.youtube.com/watch?v=Mv8TuXrrhdI
  - i. Note. At the 39-second mark, this video shows how to share your background check with the Texas 4-H program. If you need to share your background check with AgriLife

Extension as a Master Volunteer or committee volunteers, instead of typing in Texas A&M AgriLife 4-H, type <u>Texas Master Volunteers</u>.

#### **Screening Timeline & Processing**

- 1. Initial screening of a volunteer is conducted when he/she applies for a volunteer role with Extension. Volunteers must submit their application fee, be screened, cleared, and approved by the county prior to fulfilling any volunteer roles.
- 2. Re-screening through the EVS program is conducted every three years from the volunteer's most recent screening. See note above about 4-H volunteers following the 4-H program year on page 2.
- 3. No grandfathering of volunteers is allowed in the EVS program.
- 4. The background check begins as soon as the volunteer confirms their information and submits the background check form with Sterling Volunteers.
  - a. **NEW!** Note. The vast majority of background check reports are returned within 48 hours. However, there have been instances where the background checks have taken 2 weeks or even 2 months. The Extension Volunteer Standards office has no control over how long it takes for the background check report to be completed. Please allow plenty of time for your background check report to be returned.

#### **Screening from Other Entities**

- Screening conducted by other entities will not be accepted by AgriLife Extension. All
  volunteers must be screened according to the Extension Volunteer Standards guidelines.
  Master Naturalists and EFNEP volunteers follow the procedure outlined by their respective
  program areas and our partner agencies.
- 2. Any volunteers who were approved by the Extension Volunteer Standards office with documentation from another entity within the last three years will be approved until the existing screening timeline has expired.

#### Confidentiality

- 1. Sterling Volunteers' online form will collect the private, personal information for the background check. It will not be stored in 4HOnline, the Extension Volunteer Standards database or in any AgriLife Extension records.
- 2. Background check reports are reviewed and processed by two employees who oversee the EVS program. These individuals have been screened for security sensitive purposes and to handle confidential information.
- 3. Copies of the results cannot be shared with anyone. Volunteers may access their own copy of the background check report through their login with Sterling Volunteers.
- 4. County Extension Agents, District 4-H Specialists, District Extension Administrators, and/or Regional Program Leaders are not informed of the details of the criminal history record.
- 5. Information obtained through the volunteer application and screening is held in the highest confidence.
- 6. All electronic files are password protected at multiple levels.

#### **Volunteer Status Determination Process**

- 1. Criminal records are reviewed when a charge or conviction appears on the background check report.
- 2. A volunteer's status is based on the charge or conviction, frequency of offense, and the amount of time passed since the occurrence of the offense.
- 3. All volunteer records are reviewed and handled on an individual basis.
- 4. Although criminal records are comprehensive over an individual's lifetime, the EVS program focuses on the most recent ten (10) years of the summary. Convictions in the dismissed section below are the exception to the 10-year focus.
- 5. Volunteer applicants are identified with one of the following Screening status categories:
  - a. Approved: Approved to fulfill all duties of the volunteer role for which the volunteer is applying.
  - b. Restricted: Restrictions may be imposed based on the charges or conviction records. Example: A conviction of numerous hot checks would result in a restriction of not handling or managing any group funds.
    - Example: A DWI conviction in the last ten years would result in a restriction of not driving youth other than the volunteer's own legal children.
  - c. Pending Review: This determination is based on an incomplete criminal history report, no disposition of a case or a question related to a charge. Additional information may be requested from a volunteer. Any follow-up information is sent by the volunteer directly to the EVS office. Details regarding records are not shared with county or other program faculty.
  - d. Pending Background Check: This status is given while the background check is processing with Sterling Volunteers. This means the report has not been completed and provided to EVS yet.
  - e. Dismissed/Denied: A volunteer is dismissed/denied based on certain convictions of the Texas Penal Code and/or other questionable situations at an Extension event. Automatic dismissals result from indecency with a child, injury to a child, sexual assault, murder, or felony drug convictions. A volunteer may also be denied if he/she does not respond to requests for more information on a charge(s). Examples: A conviction of embezzlement or mishandling Extension group funds would result in dismissal. A registered sex offender would result in a denial.
- 6. No person may serve with youth or children who has ever been convicted of any disqualifying offense, been on probation or received deferred adjudication for any disqualifying offense or has presently pending any criminal charges of any disqualifying offense before a determination of guilt is made including any person who is presently on deferred adjudication. Disqualifying offenses include, but are not limited to, the following:
  - A felony or misdemeanor classified as an offense against a person or family.
  - A felony or misdemeanor classified as an offense against public order or indecency.
  - A felony or misdemeanor violation of any law intended to control the possession or distribution of any substance included as a controlled substance in the Texas Controlled Substances Act.

#### **Reassignment of Volunteer Status**

- 1. The following conditions may warrant review of a volunteer's status:
  - Questionable situation
  - Violation of volunteer code of conduct
  - A written complaint against a volunteer
  - Knowledge of a volunteer being charged or arrested
  - Knowledge of a volunteer making an improper advancement toward a youth
- 2. County Extension Agents should communicate with their respective District Extension Administrator immediately upon learning of an incident or questionable situation.
- 3. Copies of correspondence sent to the volunteer (i.e., dismissal letter) should be sent to the EVS office and the appropriate program director (4-H, Master Gardener, Master Naturalist, Master Wellness, etc.) so it may be filed with the volunteer's record.

#### **Grievance Procedure**

- 1. The following is the procedure if a volunteer chooses to dispute a decision made by AgriLife Extension during the application process or at any time during the volunteer's appointment with Extension.
  - a. The volunteer submits concern in writing to the Extension Volunteer Standards office, with a copy to the District Extension Administrator, and County Extension Agent.
     Letters should be sent to the following address:

Texas A&M AgriLife Extension Service Extension Volunteer Standards Laura A. Huebinger 2473 TAMU College Station, TX 77843-2473

- b. The appeal is reviewed, and the volunteer receives a written statement from the EVS office regarding the decision made within a reasonable amount of time.
- c. This grievance procedure pertains only to decision(s) made by Extension personnel. If a concern is raised about the information obtained through a criminal background check, the volunteer should be given the following information.
- 2. The following is the procedure if a volunteer chooses to dispute the information contained on the criminal history record as provided by Sterling Volunteers.
  - a. The volunteer will need to contact Sterling Volunteers directly to dispute any information that is incorrect. The volunteer will need to call The Advocates (part of Sterling Volunteers) at 855-326-1860, Option 3.
  - b. The Advocates will walk the volunteer through the Adverse Action process. If there is a valid error, The Advocates can help them clear up the incorrect record.

#### **4-H Volunteer Screening Procedures**

#### **Volunteer Online Forms**

- 1. All 4-H volunteers must enroll online via 4HOnline. If a volunteer does not have access to the internet, he/she may complete and submit a Texas 4-H Adult Volunteer Application (downloaded from the Texas 4-H Website: texas4-h.tamu.edu). The County Extension Office must then input the volunteer's information into 4HOnline.
  - a. Please note the trainings must be completed by the volunteer through their Family login. A Manager may not complete the trainings for the volunteer.
- 2. Since 4-H volunteer screening is processed through 4HOnline, 4-H volunteer forms do NOT have to be mailed in to process for screening. However, payment must be received in order for the volunteer application process to be completed.
- 3. 4-H volunteer applicants must complete the required online trainings during the enrollment process. Trainings must be completed, screening must be approved, payment received, and approved by county prior to serving in any volunteer roles.
- 4. It is recommended that all volunteers for the current year submit their profiles no later than August 1. There is no guarantee screening can be conducted and applications approved prior to the close of the 4-H year on 4HOnline as preparations begin for the new 4-H year.
- Visit the 4HOnline Resources page on the Texas 4-H website at <a href="https://texas4-https://texa

#### **Re-activating 4HOnline Profiles**

- 1. When volunteers enroll for the new 4-H year, it is important they re-activate their profile on 4HOnline and not create a new profile. If a new profile is created, the volunteer screening information will not transfer to the new profile. Therefore, the system will indicate the volunteer needs to be screened. There is not a way to undo the screening and associated fees.
- Visit the 4HOnline Resources page on the Texas 4-H website at <a href="https://texas4-https://texa

#### **AgriLife Extension Employee Profiles**

- The following applies to Texas A&M AgriLife Extension Service employees. This includes
  County Extension Agents, Specialists, Associates, Assistants, district/state administrative
  assistants, administration, or any other employee whose position is funded by Texas A&M
  AgriLife Extension Service and who have been screened through AgriLife Extension Human
  Resources. It does not apply to county employees.
- 2. When AgriLife Extension employees create or re-activate a profile, there is an option on the Volunteer Types screen to indicate him/herself as an AgriLife Extension employee. Select the "Program Volunteer" Volunteer Type and then "Add" the "AgriLife Extension Employee" option. Selecting this option will bypass the screening requirement.
- 3. The employee will still need to submit a payment method. If submitted properly, the profile will be reviewed by the EVS office, the volunteer application fee will be waived, and the Child Protection Training will be marked as completed. The employee will need to complete the Volunteer Orientation Training.

- 4. Once an employee's Screening is approved and the employee completes the Volunteer Orientation Training at the state level, it will then be ready for approval at the county level.
- Visit the 4HOnline Resources page on the Texas 4-H website at <a href="https://texas4-https://texa

#### **Screening Cost and Payment Options**

- 1. 4-H volunteers are assessed a volunteer application fee in the amount of \$10. This fee is assessed annually when a 4-H volunteer creates or re-activates his/her profile in 4HOnline. The application fee will cover the cost of volunteer screening as well as insurance coverage.
- 2. Payment of the 4-H volunteer application fee can be made by club/county check or by the volunteer's personal credit card.
  - a. <u>Check Payments</u>: The County Extension Office will create an invoice, secure a check, and mail both invoice and check to the Texas 4-H Office. Once received, the invoice and check will be processed and credited against the 4-H volunteer's profile. Once this entire process is completed, the county may give final approval of the volunteer's profile, which will then become "Approved." Please note that the check payment process is much slower than payment made by credit card since profiles cannot be approved at the county level until payment is received and processed.
- 3. Each county, club and/or association is responsible for determining how to cover the cost of volunteer application fees.
- 4. Note: Volunteer application fees paid by check will not become eligible for approval at the county level until the payment has been received and processed by the Texas 4-H Office. Once approved by the county, the payment method cannot be changed.

#### **Creating an Invoice for Payments by Check**

- When paying the volunteer application fees by club/county check, a volunteer screening
  invoice generated from 4HOnline must accompany the payment. For additional details, see
  the 4HOnline Resources page at <a href="https://texas4-h.tamu.edu/4honline/">https://texas4-h.tamu.edu/4honline/</a>. See the 4HOnline
  County Office Manager Guides for instructions on how to send payments by check.
- 2. Mail the invoice, along with the check payment, to the Texas 4-H Office.
  - a. Checks should be made payable to Texas A&M AgriLife Extension and mailed to the following address:

Texas A&M AgriLife Extension Service Texas 4HOnline Payments 2473 TAMU College Station, TX 77843-2473

RUSH DELIVERY (Overnight USPS, FedEx, UPS, or Lonestar)
Texas A&M AgriLife Extension Service
Texas 4HOnline Payments
Texas A&M University
1470 William D. Fitch Parkway
College Station, TX 77845

b. Check payments for volunteer application fees must be paid separately and not combined with youth enrollment or event registration fees.

3. Note: Volunteer application fees paid by check will not become eligible for approval at the county level until the payment has been received and processed by the Texas 4-H Office.

#### **Final Approval of 4-H Volunteer Applications**

- 1. Note that screening of volunteers is conducted after the volunteer has submitted his/her application. The County Extension Office gives final approval on volunteer applications.
- 2. Once the county approves the volunteer profile, the payment method cannot be changed.
- 3. If paying by credit card, the card will be charged when the volunteer profile is approved at the county level. When paying by check, the profile cannot be activated until the check payment has been received by the Texas 4-H Office and payment has been marked as received in 4HOnline.

#### **Follow Up to Screening**

- 1. Volunteer Status. Upon completion of screening, a 4-H volunteer's Screening status will be updated in 4HOnline. The status will be designated as one of the following: Approved, Restricted from handling funds, Restricted from driving youth other than own children, Restricted with other specifications, or Rejected.
- 2. Correspondence.
  - a. An automatic email is sent by 4HOnline to the volunteer stating their volunteer profile has been approved.
  - b. If a volunteer is Restricted or Rejected, a letter will be sent directly to the volunteer from the EVS office, with a copy of the letter emailed to the appropriate County Extension Agent(s), District 4-H Specialist, and District Extension Administrator. Details regarding criminal background records are not shared with county or other program faculty.

#### **Screening Summary Reports**

- County Extension Agents may generate a volunteer screening report from 4HOnline. See the Programs for Minors page (<a href="https://texas4-h.tamu.edu/minors/">https://texas4-h.tamu.edu/minors/</a>) under the Background Screenings section for instructions on how to generate a volunteer screening report through 4HOnline
- 2. This report will provide a list of all 4-H volunteers in your county that have a 4HOnline profile, their screening status, and last year approved through EVS.

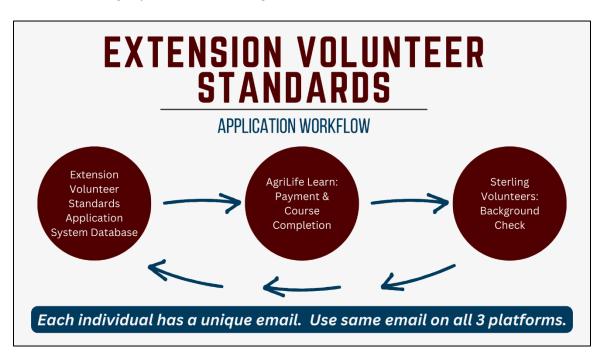
#### **Non-4-H Volunteer Screening Procedures**

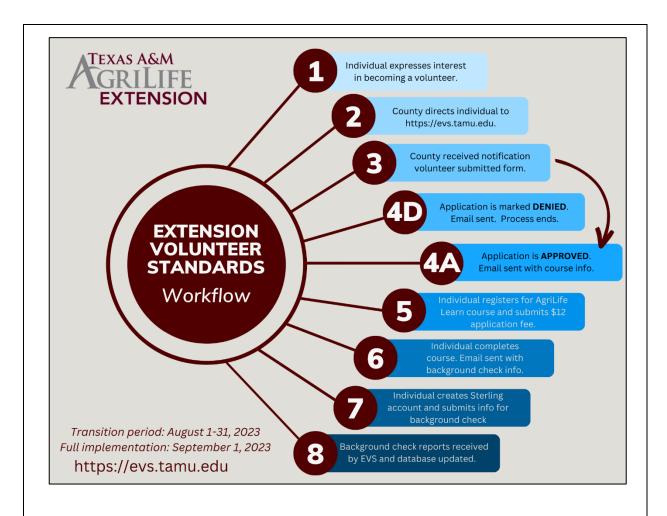
#### **NEW!** Volunteer Applications – General Overview

This section is a general overview of the new process. Detailed instructions are in the following sections.

#### Very important notes about email addresses!

- Each volunteer must use their own <u>unique</u> email address. (For example, not shared with a spouse.)
- That <u>same email address is used in all platforms</u> of the Screening and Training process: EVS database, AgriLife Learn, and Sterling Volunteers.





- 1. *Transition Timeline*. The application process for all non-4-H volunteers must be completed online. This includes the application, payment, required trainings, and the background check. The same email address should be used for all steps in the process.
  - a. The transition period between the "old" process (as outlined in August 2022) and this new process will begin on or around August 1, 2023.
  - b. For those utilizing the old process (only through August 1, 2023), the transmittal forms and checks <u>MUST PHYSICALLY BE RECEIVED</u> in the EVS office by August 31, 2023 to be handled using the old process.
  - c. The new process will begin on or around August 1, 2023, and will be fully implemented on September 1, 2023. The old process will no longer be utilized beginning September 1, 2023.
- Volunteer Interest & Application. Once the potential volunteer expresses interest in becoming a volunteer, the County Extension Agent or local staff directs the potential volunteer to the online Extension Volunteer Standards application form at <a href="https://evs.tamu.edu/">https://evs.tamu.edu/</a>. See page 14 for more details and Appendix B, images 1-3 for screen shots.
- 3. **County Review.** Once the online application is submitted, the County Extension Agent will receive a notification email and/or can view the submitted applications through the EVS

database. The county office will review the application and will either deny or approve the application. See Appendix B, images 4-6 for screen shots.

- a. If denied, an automated email is sent to the volunteer and the process ends. See Appendix B, image 7 for a screen shot.
- b. If approved, the process continues.
- 4. **Approval Notification.** If approved, an automated email will be sent to the potential volunteer which will include details regarding the volunteer training course information through the AgriLife Learn platform. See page 15 for more details and Appendix B, image 8 for a screen shot.
- 5. AgriLife Learn & Payment. The volunteer will use the link from the automated approval email to get to the online volunteer course in the AgriLife Learn platform. The volunteer will either login or create a new profile. The same email address used for the EVS application should be used with AgriLife Learn. See page 15 for more details and Appendix B, images 9-14 for screen shots.
  - a. Note. If your county is purchasing seats for the group, stop here before submitting your individual payment. Contact your county for the course information.
  - b. Note. Payment will be processed and received through the AgriLife Learn platform before the volunteer may begin the course.
- 6. **Course Completion.** Once the course is completed, an automated email from AgriLife Learn is sent to the volunteer with information regarding how to complete the background check through Sterling Volunteers.
- 7. **Sterling Volunteers.** The volunteer goes to the Sterling Volunteers website from the provided link, creates an account, and submits their information. The same email address used for the EVS application and AgriLife Learn should be used with Sterling Volunteers. See page 16 for more details and Appendix B, images 15-16 for screen shots.
- 8. **Background Check Completed.** Once completed, the background check reports are sent to the EVS office for review.
- 9. **Database Update.** The EVS database is updated to reflect the volunteer's screening status. County Extension Agents and local staff can login to the EVS database to access volunteer applications and screening status. If county staff needs login information, contact the EVS office. See page 18 for more details and Appendix B, images 17-18 for screen shots.

#### **NEW!** Extension Volunteer Standards Application System Database

- 1. Direct your browser to <a href="https://evs.tamu.edu/">https://evs.tamu.edu/</a>
- 2. Find the program in which you are volunteering. Click the maroon button in that section that says, "Apply now to become a \_\_\_\_\_ volunteer." If you are applying to volunteer for more than one program, you will be able to add your second program on the application on the next page.
  - See Appendix B, image 1 for a screen shot. You may view a video with a screen recording of what the process will look here: <a href="https://youtu.be/dst\_iniRQyU">https://youtu.be/dst\_iniRQyU</a>
  - If you are applying to become a <u>Master Naturalist ONLY</u>, you DO NOT need to complete the background check through this process. The application process will be completed through Texas Parks & Wildlife.
  - If you are applying to become a <u>4-H volunteer</u>, you do not need to apply on this form. 4-H volunteers must apply annually through the 4HOnline enrollment system.
- 3. Complete the application with the following information: (See Appendix B, image 2 for a screen shot.)

- County in which you are volunteering
- Program Area(s)
- First, Middle, Last Names, Suffix
- Preferred name, if different from first name
- Email (use the same email address throughout the entire process)
- Phone number
- Mailing address, city, state, zip code
- Date of birth
- Gender
- Race and Ethnicity
- Answer the questions about your experience
- Review and agree to the Volunteer Media Release & Authorization Statement
- Agree to the reCAPTCHA
- Save & Close
- 4. You will be directed to a confirmation page that your information was submitted. *See Appendix B, image 3 for a screen shot.*
- 5. You will receive an email notification after the county reviews the application and decides to deny or approve the application. *See Appendix B, images 7-8 for screen shots.* 
  - If approved, the automated email that will be sent to the potential volunteer will include details regarding the volunteer training course information through the AgriLife Learn platform.
  - The sender's name on the email will be <u>Texas A&M AgriLife EVS</u> and the sender email address will be <u>noreply@evs.tamu.edu</u>.

#### **NEW!** AgriLife Course Payments

- 1. All payments will be processed through AgriLife Learn. The application fee is \$12. Payment must be received and processed by AgriLife Learn BEFORE the volunteer can begin the course. See Appendix B, images 9-14 for screen shots.
- 2. No payments will be processed through the EVS office after August 31, 2023.
- 3. The fastest method for an individual to pay is using a credit card through AgriLife Learn. Volunteers can also pay with a check/invoice created by AgriLife Learn and mail in the check with the invoice. Once received and processed, the volunteer can begin the course.
- 4. Counties can also "purchase seats" in bulk for the whole group.
  - A credit card can be used, or an invoice/purchase order can be generated to mail in the payment.
  - The county can "assign seats" either during checkout or after payment.
  - If someone does not redeem their seat, the purchaser is later able to edit those seat assignments to reassign to someone else so the county does not "lose" that seat on someone who fails to complete the process.
  - If the county would like to purchase seats in bulk, reach out to the EVS office to receive the course link.
- 5. The EVS office will not process application fee payments. Any questions related to payment must be directed to AgriLife Learn. See the AgriLife Learn FAQ for more details about payment options: <a href="https://agrilifelearn.tamu.edu/s/contactsupport">https://agrilifelearn.tamu.edu/s/contactsupport</a>

#### **NEW!** AgriLife Learn: Volunteer Training Course

- 1. The volunteer training course on AgriLife Learn consists of three modules.
  - Module 1: Welcome to Extension, History of Extension, Use of the Master Volunteer
    Title
  - Module 2: Risk Management, Conflict Management, Financial Management.
  - Module 3: Working with Youth, Working with Adults, Repecting Audiences in Outreach & Education
- 2. Overall, the course is estimated to take 2-3 hours to complete. Progress can be saved along the way and does not have to be completed in one sitting.
- 3. The volunteer will have 60 days to complete the course before the volunteer is automatically unenrolled from the course. Reminder emails are scheduled to be sent at 30 days, 15 days, and 5 days before unenrollment. The application fee will be forfeited if not completed within the 60-day window.
- 4. The course will be valid for three years, then the course must be retaken. This coincides with the renewal of the background check.

#### **NEW!** Sterling Volunteers Login and Background Check Process

- If you are an <a href="mailto:employee">employee</a> of Texas A&M AgriLife Extension Service, you DO NOT need to complete the background check. As a reminder, that is any employee whose position is funded by Texas A&M AgriLife Extension Service and who has been screened through AgriLife Extension Human Resources. Employees who are solely employed by the county have not had a background check conducted by AgriLife Extension Human Resources.
  - o If you are applying to become a <u>Master Naturalist ONLY</u>, you DO NOT need to complete the background check through this process. The application process will be completed through Texas Parks & Wildlife. If you are applying to be a Master Naturalist and another volunteer type with AgriLife Extension, you must complete a background check with both TPWD and AgriLife Extension.
  - If you are applying to become a <u>4-H volunteer</u>, you do not need to apply on this form.
     4-H volunteers must apply annually through the 4HOnline enrollment system.
- AgriLife Extension uses the services of Sterling Volunteers to conduct the background check. See Appendix B, images 15-16 for screen shot.
  - You may view a video with a screen recording of what the process will look here: https://youtu.be/ltamXyqRBJw. The steps are as follows.
- Go to the website: https://app.sterlingvolunteers.com
- Create a new account through the Sterling Volunteers portal.
  - \*If you already have a Sterling Volunteers account with a current background check, see instructions on page 5.
- Select "GET VERIFIED" and enter GOOD DEED code (The GOOD DEED code will be provided in email after completing course on AgriLife Learn.)
- Fill out the four steps and click COMPLETE.
- You will need:
  - First, Middle, Last Names
  - Suffix
  - Date of Birth
  - Social Security Number
  - Gender
  - Phone Number

- Email address
- Address and how long you've lived at that address
- We highly suggest using either Mozilla Firefox, Google Chrome or Safari on a desktop or laptop computer. This ensures that compatibility issues are avoided when accessing the website and ordering background checks.
- There is a Confirmation/Congratulations page after submission.
- Volunteers may also log back into their account and see their Activity History and status of their background check.

Note. You will receive three emails from Sterling Volunteers during this process. The sender's name of the email will be <a href="Sterling Volunteers">Sterling Volunteers</a>. The email address will be <a href="TheAdvocates@sterlingvolunteers.com">TheAdvocates@sterlingvolunteers.com</a>.

- Your Sterling Volunteers Account
  - o Confirmation of creating an account with Sterling Volunteers.
- You did it! You're on your way to becoming a Verified Volunteer!
  - o Confirmation of submission of the background check order.
- Texas Master Volunteers has reviewed your background check
  - Confirmation of completion of your background check and review by Extension Volunteer Standards office.

\*If you already have an account and login with Sterling Volunteers, you can "share" your background check through Sterling.

- 1. Go to the website: <a href="https://app.sterlingvolunteers.com">https://app.sterlingvolunteers.com</a>
- 2. Login with your existing Sterling Volunteer credentials.
- 3. In the bottom right corner, under the My Screening Checklist, click the orange text, "Find organizations and share my background check."
- 4. In the Filter section, type the zip code 77845 (College Station).
- 5. In the Organization Name section, type Texas Master Volunteers.
- 6. Click the orange Search button.
- 7. In your search results, you should find Texas Master Volunteers with the email address of <a href="mailto:lhuebinger@ag.tamu.edu">lhuebinger@ag.tamu.edu</a>, phone number of 254-974-9027, and the city of College Station.
- 8. Click the Share Screening button. You will only be able to share your background check if it is still current.
- See this video for a screen recording and instructions about the process of sharing your existing background check report through Sterling Volunteers: https://www.youtube.com/watch?v=Mv8TuXrrhdI
  - Note. At the 39-second mark, this video shows how to share your background check with the Texas 4-H program. Instead of typing in Texas A&M AgriLife 4-H as shown in the video, enter <u>Texas Master Volunteers</u>.

#### **NEW!** Follow Up to Screening

- 1. Volunteer Status. Upon completion of screening, a non-4-H volunteer's Screening status will be updated in the EVS database. The Screening status will be designated as one of the following: Approved, Restricted from handling funds, Restricted from driving youth other than own children, Restricted with other specifications, Pending, or Denied.
- 2. Correspondence.

- a. An automatic email is sent from Sterling Volunteers to the volunteer stating their background check report has been completed.
- b. If a volunteer is Restricted or Denied, a letter will be sent directly to the volunteer from the EVS office, with a copy of the letter emailed to the appropriate County Extension Agent(s), District 4-H Specialist, and District Extension Administrator. Details regarding criminal background records are not shared with county or other program faculty.
- c. If the volunteer's Screening status is Pending, a letter will be sent directly to the volunteer from the EVS office requesting additional information before determining a final Screening status. A copy of the letter will be emailed to the appropriate County Extension Agent(s), District 4-H Specialist, and District Extension Administrator. Details regarding criminal background records are not shared with county or other program faculty.
  - i. If there is no response after 30 days, a reminder letter will be sent to the volunteer allowing another 30 days.
  - ii. If there is no response after an additional 30 days, a letter will be sent to the volunteer indicating their application is denied. The application fee will be forfeited.

#### **NEW!** Screening Summary Reports

- 1. County Extension Agents may generate a volunteer screening report from the EVS database.
- 2. This report will provide you with a list of all Master Gardeners, Master Wellness Volunteers, and General Committee volunteers in your county that have an application in the EVS database, their screening status, and last year approved through EVS.
  - See Appendix B, images 17-18 for screen shots.
  - You may view a video with a screen recording of what the process will look here: <a href="https://youtu.be/OWOY3vdTxNM">https://youtu.be/OWOY3vdTxNM</a>.
- 3. Note. When data was imported into the EVS database from the old Excel spreadsheets for each county, there were many missing data points from the original data such as email addresses and phone numbers.
  - a. If you see information that you believe is an error, please contact the EVS office immediately. When sending an email or calling, please be sure to include the county, volunteer's name, the incorrect information, and the correct information. The EVS office will review files to help correct the information.

#### **Appendices**

- A. Links to Instructional Videos: Extension Volunteer Standards Database Application Process
- B. Screen shots of Extension Volunteer Standards Database Application Process
- C. Who Should Be Screened: Roles of Volunteers
- D. Sample Letter: Volunteer Acceptance Screened through EVS
- E. Sample Letter: Time for Rescreening

#### Appendix A

#### **Links to Instructional Videos:**

#### **Extension Volunteer Standards Database Application Process**

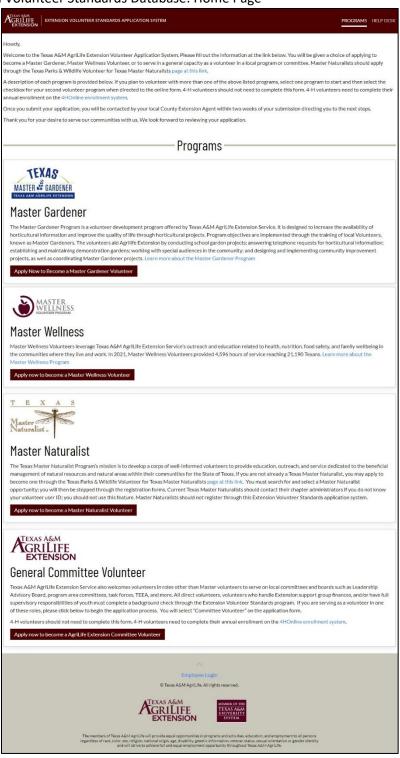
- 1. Extension Volunteer Standards Database:
  - All videos listed in playlist:
    - https://www.youtube.com/playlist?list=PLy87pije2azU8MqZRMINdWUnlqn6np1B3
  - Or each video individually:
    - i. General Overview: <a href="https://youtu.be/5JyGHdhzQ7Q">https://youtu.be/5JyGHdhzQ7Q</a> (2:10)
    - ii. Volunteer Application: <a href="https://youtu.be/dst\_iniRQyU">https://youtu.be/dst\_iniRQyU</a> (3:26)
    - iii. County Login: https://youtu.be/OlggpXQ04mc (1:05)
    - iv. Application Denial & Approval: <a href="https://youtu.be/75YVdyRGpww">https://youtu.be/75YVdyRGpww</a> (3:00)
    - v. Agent Reports: <a href="https://youtu.be/OWOY3vdTxNM">https://youtu.be/OWOY3vdTxNM</a> (5:13)
    - vi. Agent Wrap-Up: <a href="https://youtu.be/ZoVZebffRB0">https://youtu.be/ZoVZebffRB0</a> (0:48)
- 2. AgriLife Learn: Course Payments & Bulk Purchases
  - https://youtu.be/wECY47MyzfU (2:37)
- 3. Sterling Volunteers: GOOD DEED Code
  - https://youtu.be/ltamXyqRBJw (2:29)
- 4. Sterling Volunteers: Sharing background check report through Sterling
  - https://youtu.be/Mv8TuXrrhdl (2:13)
  - See page 5 for additional details.

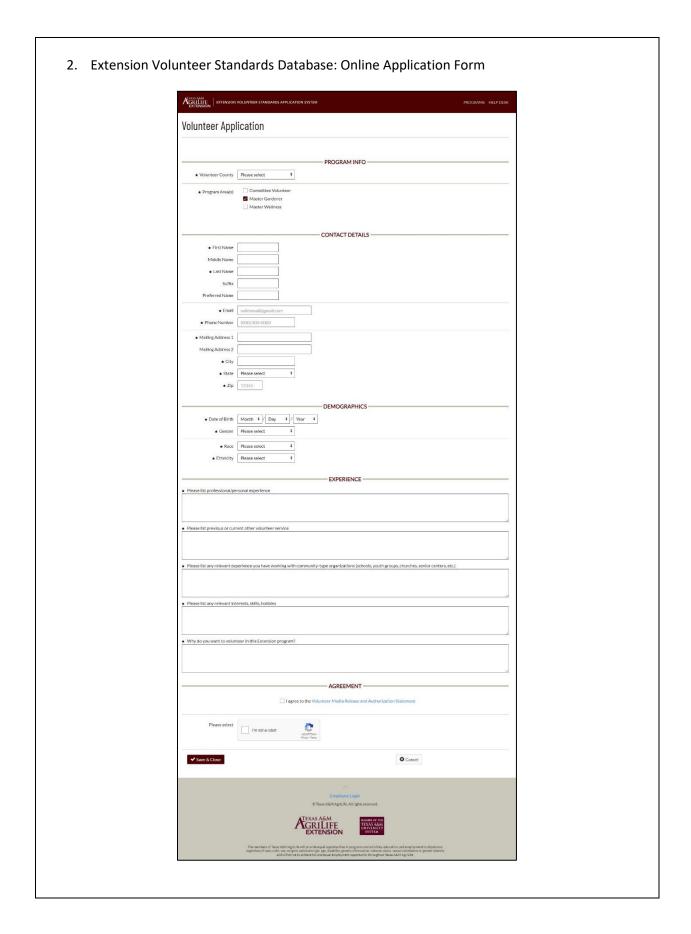
#### **Appendix B**

#### **Screen Shots:**

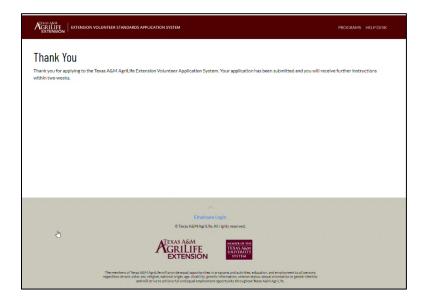
#### **Extension Volunteer Standards Database Application Process**

1. Extension Volunteer Standards Database: Home Page

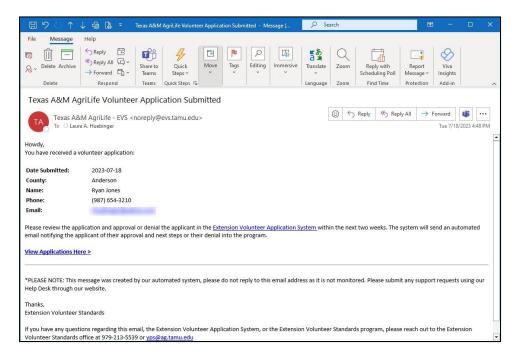




3. Extension Volunteer Standards Database: Application Submission Confirmation Page



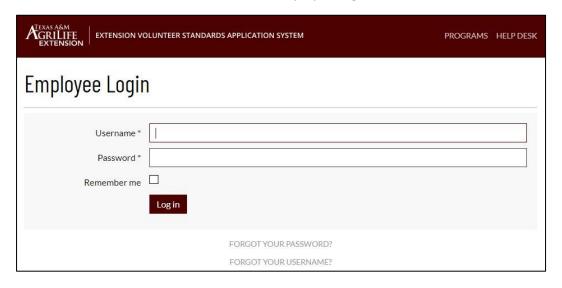
4. Extension Volunteer Standards Database: County Notification example



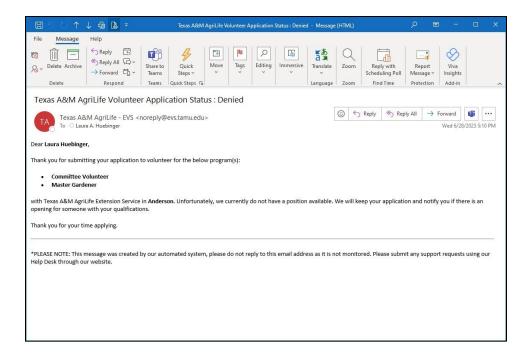
5. Extension Volunteer Standards Database: Employee Login Link



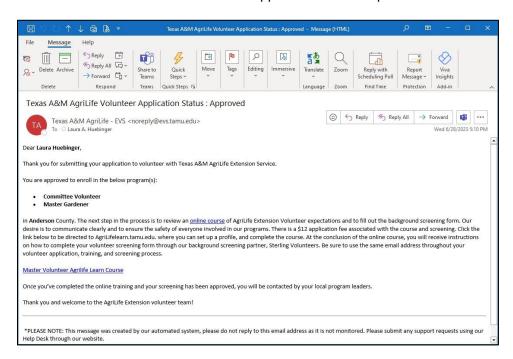
6. Extension Volunteer Standards Database: Employee Login Credentials



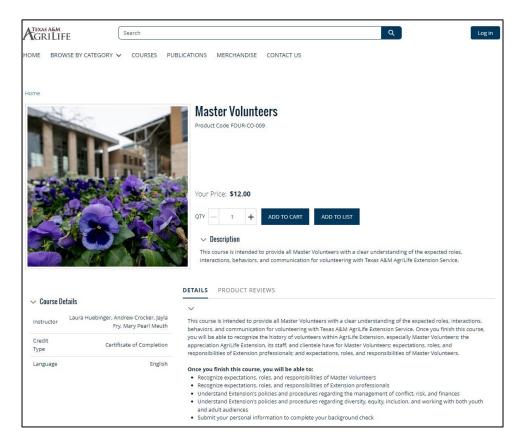
#### 7. Extension Volunteer Standards Database: Denial Email example



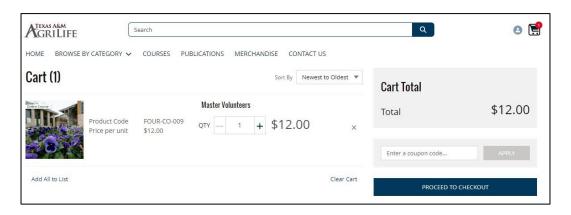
8. Extension Volunteer Standards Database: Approval Email example



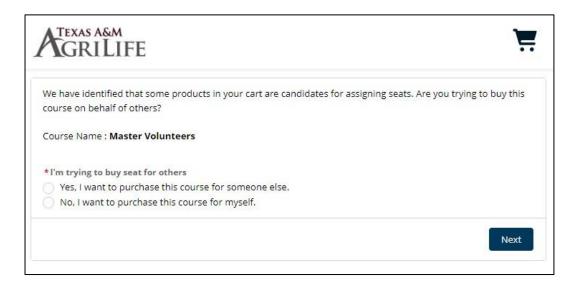
#### 9. AgriLife Learn: Course listing



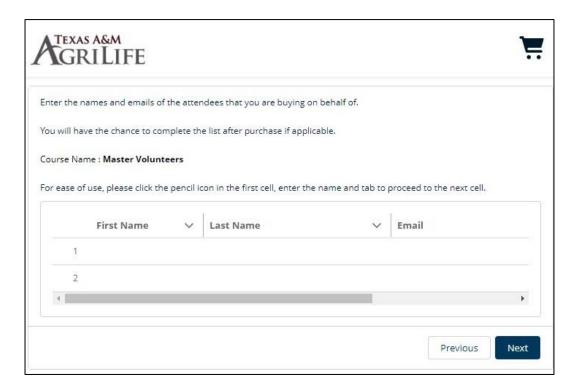
#### 10. AgriLife Learn: Payment for course - Cart



11. AgriLife Learn: Payment for course – Bulk Purchase (if applicable)



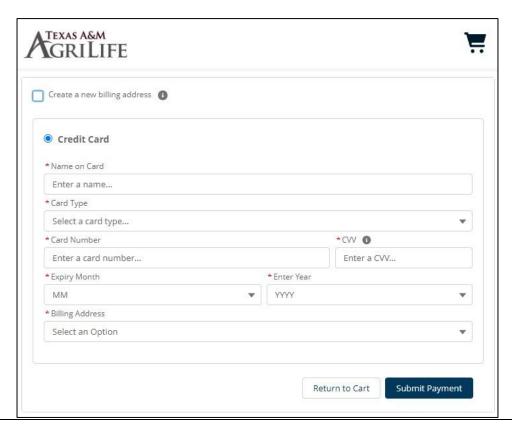
12. AgriLife Learn: Payment for course – Bulk Purchase, Assigning Seats (if applicable)



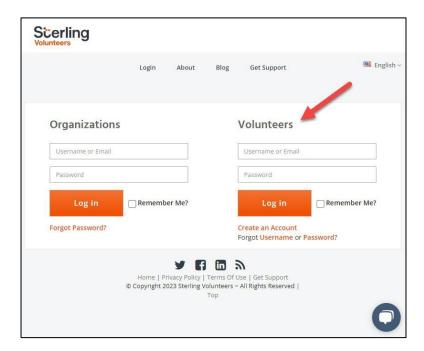
13. AgriLife Learn: Payment for course – Checkout Summary



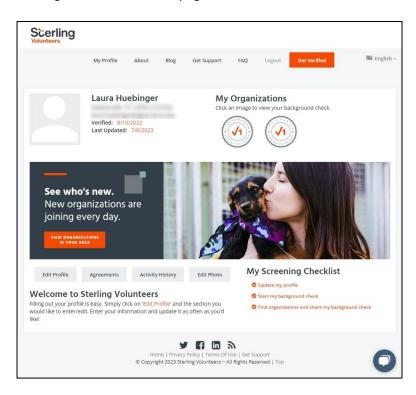
14. AgriLife Learn: Payment for course – Payment page



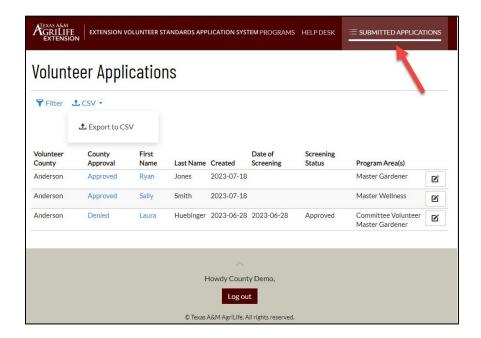
#### 15. Sterling Volunteers: Login page



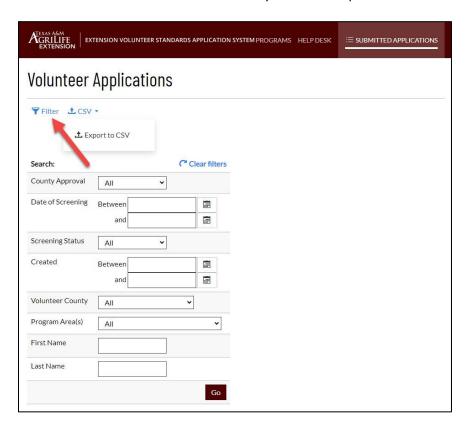
#### 16. Sterling Volunteers: Profile page



17. Extension Volunteer Standards Database: County Access to Reports



18. Extension Volunteer Standards Database: County Access to Reports Filter



### **APPENDIX C**

## WHO SHOULD BE SCREENED?

See pages 2-3 for definitions of Roles of Volunteers.

Volunteer Type	Role of Volunteer	Screened?
Achievement Event Judge	Episodic	No
Activity Leader	Direct	Yes
Volunteer/Parent providing transportation to a 4-H event, coordinated by the County Extension Agent or club/group	Direct	Yes
Parent providing transportation for youth to a local 4–H event, NOT coordinated by the County Extension Agent or club/group	Not a volunteer role	No
Speaker, presenter at an Extension event; no one-to-one contact	Episodic	No
Livestock Board Member/Committee Chair	Indirect	No
Validation Committee Member	Indirect	No
4-H Enrichment Curriculum Leader (teacher or volunteer)	Direct	Yes
Overnight chaperone	Direct	Yes
Master Volunteer or Livestock Mentor	Direct	Yes
4-H Club Manager/Assistant Club Manager	Direct	Yes
Volunteer/Parent who fills in for club manager on short notice	Direct	Yes
4-H Clover Kids Project Leader	Direct	Yes
Day Camp Volunteer	Direct	Yes
Treasurer/Signer on a 4-H affiliated account	Direct	Yes
Shooting Sports Coach	Direct	Yes
Project Leader	Direct	Yes
4-H Team Coach	Direct	Yes
Ag Day/Farm Safety Day Event  • Event Coordinator(s)  • Group Leader  • Resource Person/Speaker	Direct Direct Episodic	Yes Yes No
Assistant at 4-H contest	Episodic	No
Donor	Indirect	No
LAB/Program Area Committee Member	Indirect/Direct	No/Yes
Parent accompanying own child to event, but not serving in volunteer role (observer)	Not a volunteer role	No
Teen or Junior Leader	Youth	No
Public event sponsored by another organization and an Extension volunteer is a resource person/speaker	Episodic	No
Youth event sponsored by another organization, but Extension is responsible for portion of the day	Direct	Yes

# Sample Letter Volunteer Acceptance Screened Through EVS

We are pleased to welcome you as a Texas A8	&M AgriLife Extension Service
(program area) program volunteer in	County. We believe that you will be a
valuable addition to the	
Program with Sterling Volunteers, a national	n screened through the Extension Volunteer Standards leader in background checks for both employment and
applied, including working with and supervisi	alified to serve in the volunteer position for which you ing youth.
training programs on the county, district, regisubject matter skills, provide organizational a	er, you will have the opportunity to participate in many ional, and state levels that are designed to strengthen your and management ideas, and support you in your volunteer but the year, and you will be notified by (the county leaders' meetings, etc.).
•	es. Once again, welcome to the AgriLife Extension Program. any questions. Thank you for your interest in AgriLife
Sincerely,	
(Name)	
(Title) (Program Area)	

# Sample Letter Time for Re-Screening

	A&M AgriLife Extension Service County. We believe that you have been a (county or Extension) program.
Program. Your current screening expires on conducted every three years from the volunteer	creened through the Extension Volunteer Standards(date). Re-screening of all Extension volunteers is r's most recent screening. The volunteer background ers, a national leader in background checks for both
EVS with instructions on how to complete your application form, application fee, required train	be on the lookout for an email from Texas A&M AgriLife - re-application process which includes the online ings, and the background check. Please note that riminal background check has been conducted and you lunteer.
Please do not hesitate to call me if you have any Extension.	questions. Thank you for your interest in AgriLife
Sincerely,	
(Name) (Title) (Program Area)	