



UW-Madison 5001 Volunteer Policy: Compliance Guide

Volunteers expand the capacity of the university and contribute to the Wisconsin Idea by bringing the knowledge and resources of the university to people throughout the state. The UW-Madison Volunteer Policy defines what it means to be a university volunteer, the types of volunteer roles, and the rules for working with them. Complying with this policy is the responsibility of the volunteer program and School/College/Division engaging volunteers. This document lays out the steps needed to adhere to tracking the documentation outlined in the policy. Contact Volunteer Management Services (volunteer@ohr.wisc.edu) with any questions you may have throughout the process.



Volunteer Documentation

The Volunteer Policy requires every volunteer program to track the following:

- Volunteer Contact Information (name, birthdate, email address, phone number, emergency contact)
- Volunteer Role Description (volunteer level, supervisor, time commitment, scope of duties, onboarding/training)
- Volunteer Agreement (acknowledgements of volunteer role and policy)
- Onboarding/Training (compliance requirements and trainings to prepare volunteer for role)
- Criminal Background Check (if applicable)

Before someone can become an authorized University Volunteer, they must sign the volunteer role description and volunteer agreement, and finish all required onboarding and training required for their role.



Volunteer Documentation Process

Step 1: Identify your volunteer need

Make sure your volunteer need is typical and appropriate of common-sense volunteer services. Ensure the volunteer role:

- IS NOT essential for operations
- DOES NOT supplant or replace paid work
- DOES NOT resemble paid work in scope or time

Review the Volunteer Policy and work with Volunteer Management Services if you are unsure if your volunteer need is appropriate.

Step 2: Document the volunteer service in a Volunteer Role Description & Volunteer Agreement

Utilize the Volunteer [Role Description Template](#) to capture the services being provided by the volunteer. You must identify and document answers for each category in the role description as listed below.

1. **Volunteer Level:** Is the role Volunteer Level 1, 2, or 3? Utilize the table below to help determine.

Volunteer Level	Time Commitment	Risk of Duties	Example
Volunteer Level 1	Low, a few hours or days	Low – Minimal Skill	Greeter at Event
Volunteer Level 2	Moderate, Weekly/ Monthly	Moderate	Weekly Book Sorter
Volunteer Level 3	Moderate - High	High – Leadership, Positions of Trust	Youth Program Project Leader

2. **Supervisor:** Who is the point of contact for the volunteer? This person should be providing Direction/Control of the volunteer service and be available to answer any questions the volunteer may have.
3. **Time Commitment:** How many hours/days are expected of the volunteer? This should never approach a time commitment that resembles a paid position.
4. **Scope of duties:** What are the tasks you are expecting of the volunteer? State these as clearly as you can; if volunteers act outside of these tasks, they jeopardize their liability protections and status as a volunteer.
5. **Onboarding/Training:** Identify any training or compliance requirements associated with this volunteer role:
 - Is a Criminal Background Check required?
 - Is it a Position of Trust as defined in [UW-5014](#)?
 - Does the role work with youth and require [Office of Youth Protection training](#)?

- Are there safety protocols that must be followed and trained for?
- What other trainings might an individual need to be successful in this role?

After you have created the Volunteer Position Description, complete a [Volunteer Agreement](#) that coincides with the position.

Step 3: Volunteer Signs/Acknowledges Documentation

The Volunteer Policy requires tracking and documenting the data mentioned above. There are two ways to track/store documentation for volunteers.

Option 1: Use VolunteerMatters (preferred)

[VolunteerMatters](#) is a volunteer management system chosen by the Universities of Wisconsin to track volunteer data. The system utilizes volunteer projects, volunteer roles, and volunteer credentials to digitally document CBCs, agreements, trainings, and time volunteered with timestamps that automatically track when volunteers need to renew requirements.

Work with Volunteer Management Services (volunteer@ohr.wisc.edu) to set up your volunteer project, roles, and credentials for easy compliance with the policy.

Option 2: Upload Documents to Box

Work with Volunteer Management Services to set up a Box folder to upload signed volunteer role descriptions, volunteer agreement letters, and an updated spreadsheet with volunteer contact information, onboarding, and training.