



University of California Cooperative Extension
Master Gardener Program

ADMINISTRATIVE HANDBOOK FOR PROGRAM STAFF



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UNIVERSITY OF CALIFORNIA COOPERATIVE EXTENSION MASTER GARDENER PROGRAM

ADMINISTRATIVE HANDBOOK FOR PROGRAM STAFF

This *Master Gardener Program Administrative Handbook for Program Staff (Handbook)* covers the policies and procedures that govern the Master Gardener Program (MGP), an educational and public service component of the University of California, Agriculture and Natural Resources (ANR). As a University of California Cooperative Extension (UCCE) education program, UCCE MGP is designed to teach and effectively extend information to address gardening needs in many communities throughout the State of California. UCCE MGP volunteers promote the application of basic environmentally appropriate gardening practices through organized educational programs that transfer research-based knowledge and information. These policies are established to insure the educational and administrative integrity of all UCCE MGP activities and are administered and interpreted by the County Director in consultation with ANR administration.

This *Handbook* and any subsequent revisions to it are established by UCCE MGP staff and ANR administrators after careful review and analysis by UCCE MGP stakeholders, including staff, volunteers, and clientele. The Statewide MGP Coordinator renders final decisions on policy and procedure modifications in consultation with ANR administration.

Handbook sections will be reviewed and revised periodically as need with approved revisions posted on the [ANR Website](#). (For the latest policy statement, always refer to the *Handbook* posted on the Web).

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**CHAPTER ONE
INTRODUCTION AND PROGRAM BACKGROUND**

I. INTRODUCTION

The University of California Cooperative Extension (UCCE) Master Gardener Program (MGP) is an educational program designed to teach and effectively extend information to address home gardening and non-commercial horticulture needs in California. UCCE is the outreach arm of UC's division of Agriculture and Natural Resources (ANR). Master Gardener volunteers (MG volunteers) promote the application of basic environmentally appropriate horticultural practices through UCCE-organized educational programs that transfer research-based knowledge and information. The UCCE MGP is a statewide program of the University of California Agriculture and Natural Resources.

II. BRIEF HISTORY OF THE MASTER GARDENER PROGRAM

- A. From its beginnings in 1972 in King and Pierce counties in Washington, the MGP quickly expanded to Oregon, Arizona, New York, Michigan, and Washington, D.C. Today there are MGPs in all 50 states, the District of Columbia, and four Canadian provinces.
- B. In California, the UCCE MGP was originally planned and initiated by UCCE specialists, campus faculty, regional administrators, and County advisors. The UCCE MGP has been an active program, growing from pilot programs in 1980 in Sacramento and Riverside counties, to over 44 UCCE MGP County based programs in 2010. By 2010, over 17,095 people had been certified as MG volunteers in California after receiving training in basic horticulture and pest management. In 2010, there were over 4,900 active MG volunteers who donate more than 258,000 volunteer hours assisting home gardeners on an annual basis. UCCE MGP staffs have generally determined local program organization, operational guidelines, activities, and subject matter content. UCCE MGP staff and MG volunteers throughout the state also support one another through informal networks.

III. UCCE MGP CORE VALUES AND INTENDED IMPACTS

- A. The UCCE MGP utilizes trained and certified MG volunteers at the County level to conduct research-based educational programs to meet urban horticulture and pest management needs of local residents. The certified MG volunteers provide an organized approach to addressing demands for information and problem-solving help from non-commercial horticulture clientele and focus on educational programs that address the Strategic Vision of UC ANR.

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B. The ANR Strategic Vision are criteria for designing and implementing educational activities and measuring educational impacts which are based on the following:

1. UCCE MGP activities focus on education, not service.
2. UCCE programs provide information and teach practical and usable skills, but MG volunteers do not generally provide garden labor or consultant services. UCCE programs are neutral and unbiased toward specific commercial products, services, and support groups. UCCE MGP staff and MG volunteers may not solicit or perform contract services for personal gain while representing UCCE.
3. Activities meet identified Strategic Vision Initiatives and clientele needs.

UCCE MGP educational activities target adult home gardeners (often called “clientele”) and their needs in various counties. The activities are focused and incorporate the identified the [Strategic Vision of ANR](#) . Participants and audience help determine program content and delivery methods. Ideas for program improvement are regularly sought from clientele. Some MG volunteers also work with community and school youth (garden based learning activities) mainly through adult leaders and teachers in gardening activities, while others work cooperatively with UCCE 4-H Youth Development Program (4-H YDP) staff and volunteers.

4. MG volunteers are guides to learning and respect others’ viewpoints and abilities.

UCCE programs respond to a range of individual learning styles, abilities, and backgrounds. MG volunteers provide appropriate available information while respecting alternative viewpoints. They are *guides* to learning. They present horticulture technology and appropriate garden management information, including multiple options to solving local garden problems. In this way, the UCCE MGP helps clientele make more informed garden management decisions.

5. Educational activities are inclusive, not exclusive.

UCCE MGP methods and content are evaluated to assure information is not exclusively held and that UCCE MGP educational programs are available to the gardening public on an equal opportunity basis in accordance with UC and federal affirmative action/diversity policies. UCCE MGP educational efforts are available to all, limited only by UCCE’s resources.

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6. MG volunteers extend only research-based and technically accurate information.

UCCE programs extend information that is based on peer-reviewed research that flows through the Cooperative Extension educational system. MG volunteers provide information with honesty and to the best of their abilities, and refer more complex queries to more qualified UCCE MGP staff. Problem-solving options are discussed, but specific recommendations are only given within specified guidelines (see this *Handbook*, Section III. J.).

7. MG volunteers encourage improved environmental quality and sustainable gardening practices.

Environmental issues are key to many UCCE educational program priorities, including support for improved environmental quality and wise resource management.

8. MG volunteers emphasize “learn-by-doing” methods.

UCCE MGP teaching methods emphasize hands-on demonstration and provide opportunities for home gardeners to practice new skills.

9. MG volunteers teach new skills, validate achievement, and encourage extending to others.

UCCE programs recognize new skills learned. Appropriate methods are used to teach improved gardening skills, build individual confidence, and encourage application of new skills. Further, to extend the UCCE MGP impact, those receiving information from MG volunteers are encouraged to share new insights and skills with family, friends, and neighbors.

10. Activities build community support for UCCE through improved visibility.

UCCE educational activities feature appropriate, accurate information, packaged and advertised by UCCE for local clientele consumption. All UCCE programs, information, and activities are readily identifiable as products of UCCE. MG volunteers dress appropriately to their role and wear identifying name badges (see *Handbook*, Section VII.B.10 for example of badge). All distributed information is identified with the UCCE official name and address, and encourages additional contacts. MG volunteers communicate about the range of local UCCE programs offered and invite further contact.

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C. Intended Program Impact

1. UCCE MGP staff and MG volunteers organize to extend educational services to the widest audiences possible. Intended UCCE MGP impacts can be categorized into four important areas:

a. Healthier Plants

- i. Increased understanding of plant/people interaction.
- ii. Appropriate selection, placement, and care of plants.
- iii. Integrated pest-management practices.

b. Healthier Environment

- i. Optimum water use.
- ii. Improved soil quality.
- iii. Reduced reliance on pesticides.
- iv. Reduced green waste going to landfills.

c. Healthier Gardeners

- i. More vegetables and fruits consumed.
- ii. More positive gardening experiences.
- iii. More new skills learned and recognized.
- iv. More gardens in the community.
- v. Better health through gardening

d. Healthier Community

- i. More people gardening.
- ii. More positive experiences.
- iii. More group involvement.
- iv. Improved communications skills.
- v. Improved cultural understanding.

D. County UCCE MGP Initiation

1. The UCCE MGP is a Statewide program operated at the County level to address home gardening and non-commercial horticultural issues and needs. In general, an UCCE advisor, and ultimately the County Director in the UCCE County office makes the decision on whether to initiate a local UCCE MGP. UCCE MGP staff also plan and manage the scope of the UCCE MGP and MG volunteer activities. The UCCE MGP staff is responsible for the selection, training, certification, and support of MG volunteers. Routine procedures and day-to-day management of the UCCE MGP may be delegated to non-academic UCCE staff or MG volunteers,

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but the academic quality, educational focus, and impact of the UCCE MGP are the responsibility of the County academic staff.

2. To initiate a new County UCCE MGP, the appropriate UCCE advisor develops a proposal and recommends to the UCCE County Director the establishment of the UCCE MGP as part of the advisor's overall responsibilities. Before initiating a County UCCE MGP, the County Director should consult with the Statewide MGP Coordinator. The County Director makes the final decision.
3. In the absence of an UCCE advisor to oversee the UCCE MGP, and with funding for an appropriate staff coordinator position, the County Director may decide to initiate a local UCCE MGP based on County Director oversight of the program. The UCCE MGP staff coordinator must be trained in volunteer management, with training in plant sciences strongly preferred. The County Director must discuss UCCE MGP initiation with the Statewide MGP Coordinator before launching the program.
4. Likewise, should the UCCE advisor propose terminating an existing UCCE MGP in the County, she/he must consult with the UCCE County Director, who will consult with the Statewide MGP Coordinator. The UCCE MGP should be periodically evaluated to judge its impact/benefit to UCCE, home gardeners, cost and need in comparison with resources (including programmatic and administrative oversight) available for the conduct of a quality program. Before the County Director makes a decision to terminate the local UCCE MGP, impact on the trained, active volunteers, as well as clientele, must also be considered.

**CHAPTER TWO
MASTER GARDENER PROGRAM TEAM AND ORGANIZATIONAL STRUCTURE**

This *Handbook* section describes the roles and responsibilities of the people who design, create, and evaluate research, outreach, and educational activities in the UCCE MGP. It also recognizes the importance of everyone involved in UCCE MGP: Administrators of the U.S. Department of Agriculture, colleagues in other land-grant universities and the California State University and Community College systems, arboreta and botanic gardens, as well as UC departmental faculty; ANR administrators; and UCCE County Directors, UCCE MGP staff, and MG volunteers.

I. ROLES AND RESPONSIBILITIES OF ANR UCCE

- A. The UC ANR **Vice President**, is the Director of UCCE and the Agricultural Experiment Station (AES), and is responsible for all Statewide programs, including the UCCE MGP.
- B. The UC ANR **Associate Vice President** for Programs and Strategic Initiatives is the Associate Director of the AES and UCCE, is the Chair of the ANR Program Council, is the primary programmatic leader for ANR research and extension activity and also serves as statewide administrative leader for County UCCE programs, is responsible for leadership of ANR's Statewide programs, and is the program liaison with UCCE, the AES, and campus deans and oversees the Research and Extension Centers.
- C. The **Associate Vice President—Business Operations** is responsible for fiscal and planning oversight for ANR activities and maintains administrative liaison with Cooperative Extension, the Research and Extension Centers, Statewide Programs, County Programs, and campus deans.
- D. The **ANR Controller and Business Services Director** is responsible for financial oversight, internal controls, administrative policies, business contracts, risk management, insurance, business and financial services, and computer services.
- E. The **ANR Affirmative Action Contact** provides materials, resources, and training for staff and volunteers on clientele documentation and outreach activities in cooperation with the three regional offices. The affirmative action office also handles discrimination complaints and supports the process of decision-making about outreach activities and interpretation of policies and regulations related to diversity, civil rights, and affirmative action.
- F. The **Program Support Unit** provides programmatic support in key areas to those working on initiatives, programmatic advocacy efforts, statewide programs and leadership groups within ANR

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- G. The **Landscape Horticulture Specialist**, appointed jointly between the Departments of Environmental Horticulture and Landscape Architecture on the Davis campus, conducts a statewide extension education and applied research program focused on problems in landscape horticulture, and serves as a statewide programmatic resource for the UCCE MGP. The Landscape Horticulture Specialist conducts research and education programs in cooperation with County UCCE advisors, UCCE specialists, and campus faculty in areas related to the introduction, evaluation, and management of vegetation in urban landscapes. Responsibilities include close collaboration with the UC Davis Arboretum and other UC arboreta and botanic gardens. The Landscape Horticulture specialist will enhance programmatic linkages among MG volunteers, County UCCE advisors, government agency professionals, and campus faculty, particularly through the Urban Horticulture workgroup.
- H. Other **Cooperative Extension Specialists** in ANR contribute their respective programmatic expertise in areas applicable to home gardening and pest management, facilitate linkages to other UC experts, and assist in volunteer training. UCCE specialists and other ANR experts are responsible, as appropriate, for contributing to MGP resources, such as the *California Master Gardener Handbook*.
- I. The **Statewide MGP Coordinator** is an administrative and programmatic resource for the UCCE MGP. The Statewide MGP Coordinator's responsibilities include coordination and standardization of MGP training activities, development of statewide outreach initiatives that support Core Issues, and the use of distance technologies to improve delivery of the programs. The Statewide MGP Coordinator assists UCCE MGP staff and volunteers in interpreting this *Handbook* and will serve as a primary resource in all matters of UC policy and procedure. S/he will be responsible for the *California Master Gardener Handbook*, ensuring timely revisions by working with the appropriate specialists and other resource persons in UC. The Statewide MGP Coordinator reports programmatically to the Program Leader for Agriculture Productivity.

The UCCE MGP **Policy Advisory Committee** is organized by the Statewide MGP Coordinator and includes a number of key stakeholders who are consulted on policy issues. The UCCE MGP **Steering Committee** is organized in the same manner, for purposes of reviewing programmatic issues.

- J. **UCCE County Directors** are responsible for determining, in consultation with Regional Directors, whether counties will sponsor and manage MGPs. **UCCE County Directors have final authority regarding all programmatic and administrative issues relative to the MGP in their County.** County Directors are responsible for ensuring that UCCE MGPs conform to UC and ANR policies; federal, state, and local laws; safety and health regulations; affirmative action requirements; and with Statewide UCCE MGP goals, policies, and guidelines. County Directors review MGP certification materials and appoint/reappoint

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individual MG volunteers. This appointment/reappointment responsibility may be delegated to the UCCE MGP Advisor or Coordinator. County Directors also have the responsibility of excusing from further service volunteers who do not follow policies and guidelines, or who do not meet UCCE MGP standards of service. In some cases, County Directors directly manage local UCCE MGPs and/or supervise non-academic staff that have experience in volunteer management, with training in plant sciences strongly preferred. These staff members are responsible for routine UCCE MGP procedures and day-to-day operations.

- K. The **County UCCE MGP Coordinator** may be a CE advisor, County Director or staff program representative under academic supervision. The decision to initiate a local UCCE MGP is generally made by a farm advisor and the County Director in a UCCE County office. UCCE academic staff plan and manage the scope of the UCCE MGP and volunteer activity and are responsible for the selection, training, certification, and support of MG volunteers. Routine procedures and day-to-day management of the MGP may be delegated to non-academic staff or volunteers, but the academic quality, educational focus, and the impact of the UCCE MGP are the responsibility of the County UCCE academic staff.

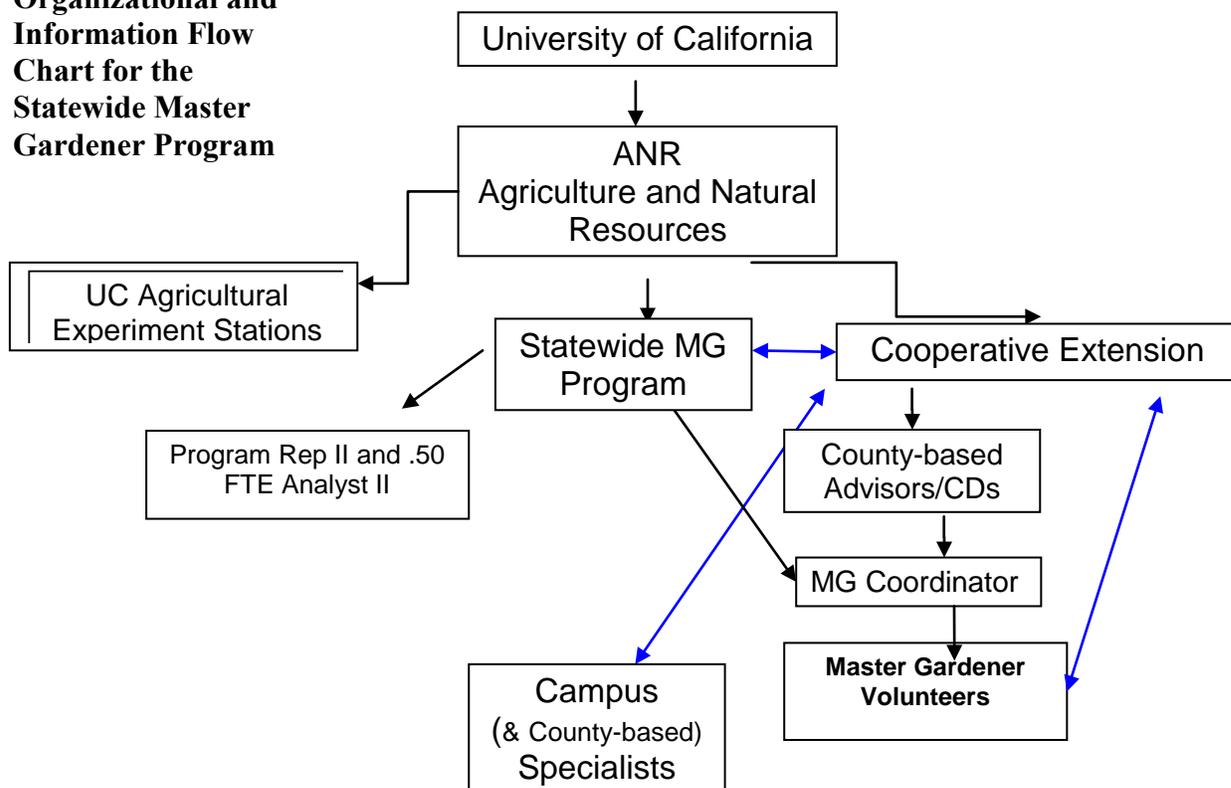
- L. **County Program Representatives** help UCCE academic staff manage local UCCE MGPs. Routine UCCE MGP procedures and day-to-day management may be delegated to an administrative position, which is typically a paid UC program representative or County staff position supervised by the farm advisor or County Director responsible for the UCCE MGP. In some counties, the program representative has major responsibility for managing all operational aspects of the County UCCE MGP including supervising volunteers and arranging horticultural training. In other counties, the farm advisor directly manages the UCCE MGP and the program representative works only a few hours weekly; functioning, for example, as a communication liaison among volunteer committee chairs.

- M. **Cooperative Extension (UCCE) Advisors** working in the area of urban horticulture collaborate with UCCE specialists, faculty, other professionals and community members to develop innovative and creative applied research and educational programs to meet the needs of local gardeners and non-commercial horticulture clientele. Farm advisors with a significant program assignment in the area of urban horticulture may, with the approval of the County Director, initiate a UCCE MGP and assume primary responsibility for its management. In some cases, farm advisors with primary responsibility for commercial environmental horticulture, agriculture, or a related field may assume this responsibility. In the absence of an advisor to oversee the UCCE MGP, this responsibility may be assumed by the County Director with an appropriate staff coordinator position. Farm advisors may directly manage all operational aspects of the UCCE MGP or supervise non-academic staff and delegate responsibility for routine UCCE MGP procedures and day-to-day management. These advisors are responsible for recommending appointments and annual reappointments of volunteers to County

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Directors. Other farm advisors who conduct programs for commercial clientele in agriculture, horticulture, pest management, natural resources and other areas contribute their respective programmatic expertise applicable to the UCCE MGP and assist in MG volunteer training.

**Organizational and
Information Flow
Chart for the
Statewide Master
Gardener Program**



II. MG VOLUNTEER ROLES AND RESPONSIBILITIES

New MG volunteers are periodically recruited and trained, as required, to fulfill the needs of UCCE MGP County programs. County residents selected to become MG volunteers receive formal training in horticulture, pest management, and educational methods from UCCE MGP staff and other qualified instructors. MG volunteers are responsible to the County Director and, through him/her, to the ANR UCCE administrators.

**CHAPTER THREE
VOLUNTEER STATUS**

I. INTRODUCTION

- A. MG volunteers agree to support local UCCE MGP educational programs, goals, and procedures as administered by the County UCCE office. UCCE MGP is committed to supporting a diverse group of individuals who are enthusiastic about being trained to serve as MG volunteers in extending UCCE's outreach capacity to home gardeners.
- B. A MG volunteer is anyone eighteen (18) years of age or older who, on an unpaid basis, agrees to provide a service or conduct an activity that supports the goals of the UCCE MGP. Such MG volunteers are recruited, oriented, trained, and annually appointed as part of the County UCCE MGP, so that they may undertake and achieve specific UCCE MGP programmatic objectives. After completing the UCCE MGP training, passing an examination, signing the *Annual Volunteer Agreement* materials, securing background investigation clearance, and satisfactorily completing other miscellaneous requirements, MG volunteer trainees are proposed by the UCCE MGP staff to the County Director for appointment as certified MG volunteers, who then serve as "agents" of UC when in the course and scope of their UCCE MGP duties.
- C. The County UCCE MGP staff may choose to use gardening volunteers in a manner other than that described in this *Handbook* (including providing training more limited than that described below). However, these volunteers may not be called UCCE Master Gardener volunteers and the County gardening programs may not be called the UCCE Master Gardener Program.

II. RECRUITMENT

- A. UCCE recruitment activities for new UCCE MG volunteers must be designed to assure that a diverse group of adults in the local community become aware of the UCCE MGP and its opportunities.
- B. All adults interested in participating as MG volunteers in the UCCE MGP must complete a *Master Gardener Volunteer Application Form* (see Appendix 2).
- C. Most UCCE County offices use a face-to-face interview process in the selection of MG volunteer trainees, often using currently appointed MG volunteers as interviewers. This provides an opportunity for information exchange regarding the UCCE MGP. While there are no specific standard criteria for the selection of MG volunteer trainees, potential trainees must be willing to comply with all policies and procedures detailed in this *Handbook* and in other UC and ANR documentation. Key characteristics of potential trainees are ability and

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willingness to volunteer, good communication skills, some horticultural expertise and other skills as needed by the program.

- D. UCCE is committed to providing safe environments for all individuals – particularly young people participating in its programs. ANR conducts a background investigation on the volunteer applicants for all of its programs, including the MGP. MG volunteers in training must not participate in any UCCE MGP activities until they have been cleared to do so through this background investigation process.

III. TRAINING (“MG VOLUNTEER TRAINEE” STATUS)

- A. Successful applicants will be enrolled in their County’s UCCE MGP volunteer training program. Once enrolled, they will enter a period of intensive academic instruction.
- B. During training, but prior to passing the qualifying examination, these individuals are referred to as “MG volunteer trainees,” “interns,” or “apprentices.”
- C. UCCE MGP volunteer training comprises a minimum of fifty (50) hours of core instruction, as described in greater detail below.
- D. Payment of a course fee to cover training expenses and program costs may be required prior to acceptance into MGP volunteer training.
- E. The County UCCE MGP staff will provide temporary name badges to MG volunteer trainees during the training period.
- F. MG volunteer trainees are covered (as are other UC students), under the UC general liability insurance policy. For additional information, contact the [ANR Office of Risk Services](#).

IV. CERTIFICATION (PASSAGE OF QUALIFYING EXAMINATION)

- A. After completing the UCCE MGP training program, MG volunteer trainees will take a qualifying examination which is coordinated by the local UCCE program staff.
- B. A score of at least seventy percent (70%) is required to pass the exam. MG volunteer trainees are notified confidentially of final exam results.
- C. Those MG volunteer trainees who pass the qualifying exam are “certified” as technically qualified to dispense home-gardening information.
- D. “Certification” is valid for a period of one (1) year.

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E. “Certification” is a condition of “appointment.”

V. APPOINTMENT (FIRST YEAR OF UCCE MGP SERVICE)

- A. A MG volunteer trainee is eligible for “appointment” after becoming certified (passing examination), and correctly submitting the follow documents, as well as completing any other local requirements.
1. *Code of Conduct/Responsibilities and Rights* (see Appendix 5). (This form is optional at the discretion of the County Director and/or Program Coordinator.)
 2. If driving is part of the MG volunteer duties, *Proof of California Driver’s License and Proof of Automobile Liability Insurance* (see Appendix 7).
 3. State of California, Department of Justice Form BC11 8016, [Request for Live Scan Service](#).
 4. Individuals, as part of the application process are also asked to complete a confidential self-disclosure form (see Appendix 14).
- B. The UCCE County Director has the responsibility and authority to appoint (or re-appoint) MG volunteers.
- C. The MG volunteer appointment is confirmed with the issuance of an official MG volunteer card or by a certificate that may be printed after completing on-line recertification process both of which are signed by the County Director and states the term of the appointment (see Appendix 10).
- D. Appointment is valid for (and may not exceed) a period of one (1) year.
- E. Upon issuance of the appointment card, or appointment certificate the MG volunteer is recognized as an agent of UC when in the course and scope of his/her UCCE MGP volunteer activities.
- F. Appointed MG volunteers are given standard MG name badges.
- G. MG volunteer appointments are county-specific (e.g., made to a single California county). MG volunteers may not be concurrently appointed to two or more California counties even though training may have been received in another county.
- H. If the MG volunteer will be using a personal vehicle during his/her UCCE MGP volunteer work, he or she is required to provide evidence to the UCCE MGP staff of current automobile liability insurance.

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VI. REAPPOINTMENT (SECOND AND SUBSEQUENT YEARS OF UCCE MGP SERVICE)

- A. Annual reappointment is required for a MG volunteer to remain active in the UCCE MGP.
- B. To be eligible for reappointment in their second (or any subsequent) year of MGP service, MG volunteers must have:
 - 1. Completed a minimum of twenty-five (25) hours of qualifying MG volunteer service during the preceding year. Annual hours of service in excess of the minimum requirement are appreciated and encouraged, but cannot be “carried over” and attributed to the next program year.
 - 2. Completed a minimum of twelve (12) hours of qualifying continuing education during the preceding year. Annual hours of qualifying continuing education are appreciate but cannot be carried over to the next program year.
 - 3. At the discretion of the County Director, the MG volunteer may be required to demonstrate core subject matter competency by examination and/or reorientation to UCCE policies.
 - 4. MG volunteers are independently and personally responsible for meeting all administrative requirements necessary to secure reappointment by correctly submitting the *Annual Volunteer Agreement & Request for Reappointment* packet either using the On-line Volunteer Management System appointment process or using paper documents found in appendix and meeting other associated requirements. For MG volunteers applying for reappointment, the *Annual Volunteer Agreement & Request for Reappointment* packet includes:
 - a. *Annual Volunteer Agreement & Request for Reappointment* form (see Appendix 3).
 - b. *Code of Conduct/Responsibilities and Rights* (see Appendix 5). (This form is optional at the discretion of the County Director and/or Program Coordinator.)
 - c. If driving is part of the MG volunteer duties, *Proof of California Driver’s License and Proof of Automobile Liability Insurance* – see Appendix 7).

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5. In order to retain active status as a MG volunteer, MG volunteers must apply for reappointment within a specific sixty (60) day period as follows:
 - a. Thirty (30) days before the end date of the current program year, through thirty (30) days after the end date of the current program year.
 6. In very unique circumstances, the County Director may make an exception to the 60 day reappointment application deadline described above. The County Director may exercise this discretion for a period of up to three (3) years after the end date of the last program year completed by the applicant. The County Director may require the applicant to engage in additional training and/or other activities.
- C. The UCCE County Director re-appoints MG volunteers on the basis of:
1. MG volunteer's quality of service and previous performance, specifically including demonstration of a supportive and cooperative relationship with UCCE MGP staff and MG volunteer peers, clientele, and/or other program stakeholders, as well as adherence to the programmatic goals established by the UCCE MGP staff.
 2. MG volunteer's hours served.
 3. MG volunteer's continuing education completed.
 4. County UCCE MGP needs.
- D. The UCCE County Director has the authority not to reappoint a MG volunteer at their sole discretion, and without providing explanation.
- E. MG volunteers that are successfully reappointed are issued new appointment cards or certificate, extending their appointment for one (1) year.

VII. INACTIVE STATUS

- A. MG volunteers who do not fulfill the reappointment requirements are classified as "inactive" for a period of thirteen (13) months following the completion of their last "active" program year.
- B. Persons classified as inactive cannot participate in UCCE MGP activities, are not considered agents of UC, and are not eligible for UC liability coverage.
- C. The County UCCE MGP staff will provide written notice of inactive status to the subject individual.

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VIII. REINSTATEMENT

- A. Request for Reinstatement (Return to Active Status)
 - 1. MG volunteers classified as “inactive” who wish to apply to resume their participation in the UCCE MGP may do so by correctly submitting the *Request for Reinstatement* packet, and satisfactorily completing any other local requirements. The *Request for Reinstatement* packet includes:
 - a. *Request for Reinstatement* form (see Appendix 4).
 - b. *Code of Conduct/Responsibilities and Rights* (see Appendix 5). (This form is optional at the discretion of the County Director and/or Program Coordinator.)
 - c. If driving is part of the MG volunteer duties, *Proof of California Driver’s License and Proof of Automobile Liability Insurance* (see Appendix 7).
- B. In order to regain active status as a MG volunteer, MG volunteers must apply for reinstatement within a specific thirteen (13) month period as follows:
 - a. Anytime within the first program year on inactive status, but no later than thirty (30) days after the end date of that year.
- C. The candidate may be required to attend selected portions of the next UCCE MGP training, to complete other special training, and/or to fulfill any other requirements identified by the County Director, including but not limited to undergoing another background investigation.
- D. Each candidate will be interviewed by the UCCE MGP staff who will forward a recommendation to the County Director. The UCCE County Director will then reinstate or decline to reinstate the candidate. MG volunteers being considered for reinstatement will be evaluated on the basis of the factors listed above under “reappointment.”
- E. The outcome of a reinstatement request will be given to the candidate in writing.

IX. RESIGNED STATUS

- A. MG volunteers who do not request and receive reinstatement according to the above described requirements will be considered “resigned.” (In addition, a MG volunteer may independently resign from the UCCE MGP at any time).
- B. In very unique circumstances, the County Director may make an exception to the thirteen month reinstatement application deadline described above, and exercise

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their discretion to reinstate a resigned MG volunteer for a period of up to three (3) years after the end date of the last program year completed by the MG volunteer.

- C. After expiration of the above-referenced three-year period, candidate must undergo all procedures required for initial volunteer appointment.

X. TRANSFER OF APPOINTMENT (OR REAPPOINTMENT) FROM ONE CALIFORNIA COUNTY TO ANOTHER

- A. Appointed MG volunteers who relocate from one California County to another may apply for transference of their appointment.
- B. To apply for transference of their appointment to the UCCE MGP in their new location, the MG volunteer must provide a summary of his/her credentials, including details of training and volunteer service, and a reference from a UCCE MGP staff member of the former county. Transference of the reappointment of the MG volunteer may be approved based on their previous training and experience, or the MG volunteer may be required to participate in further training, as per the discretion of the County UCCE MGP staff. The outcome of the request for transfer of appointment will be given to the applicant in writing.
- C. Background investigation records are not transferable from one California county to another. Accordingly, before transference of appointment can be approved, the MG volunteer must be security cleared in the new location.
- D. Individuals transferring into the Master Gardener program from another state or from another county must also complete a confidential self-disclosure form (see Appendix 14).

XI. LIMITED ACTIVE STATUS REAPPOINTMENT

- A. MG volunteers who, owing to such a significant personal problem, are unable to complete the mandatory continuing education requirements, and/or the mandatory volunteer service activity requirements, may request reappointment to limited active status. Examples of such major difficulties include (but are not be limited to) a family emergency, personal illness and financial hardship.
- B. Reappointment to limited active status may be granted on an exception basis at the discretion of the County Director.
- C. If approved, limited active status allows the MG volunteer to maintain their standing as active during a period in which they are unable to complete the normal MGP volunteer service requirements.
- D. Reappointment to limited active status may not exceed one year.

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- E. To apply for Limited Active Status, the MG volunteer must submit a correctly completed *Annual Volunteer Agreement* packet (see “Reappointment” above for additional detail; also reference Appendix 3).
- F. In the absence of any action on their part, after appointment to limited active status for a period of one (1) year, the MG volunteer will be designated as inactive.

XII. MG VOLUNTEER RECOGNITION

A. Gold Badge Master Gardener Volunteers

- 1. MG volunteers who have completed a minimum of one thousand (1,000) hours of service in good standing may be recognized by being designated as a “Gold Badge MG Volunteer.”
- 2. At their discretion, the County Director may confer the Gold Badge MG Volunteer designation.
- 3. Gold Badge MG Volunteers are not excused from any of the annual recertification requirements (minimum of 12 hours of continuing education and 25 hours of volunteer service) and must meet those requirements to obtain annual reappointment.
- 4. Gold Badge MG Volunteers receive special name badges and certificates of recognition.
- 5. Hours of service in excess of 1,000 may be recognized with specially imprinted name badges in increments of two thousand five hundred (2,500), or five thousand (5,000) MG volunteer service hours. MG volunteers who receive the 5,000 volunteer service hour badge are acknowledged at the next appropriate statewide UCCE MGP conference.

B. Honorary Master Gardeners

- 1. MG volunteers who have supported the principles and goals of the UCCE MGP and who have made outstanding contributions to the UCCE MGP may be recognized as “honorary Master Gardeners.”
- 2. At their discretion, the County Director may confer the honorary MG designation. Typically the honorary MG recognition is given to ‘retired’ MG volunteers in good standing who are no longer active in the program, but want to remain associated with it, especially including the MGP social network. (Reference Appendix 8.)

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3. Honorary MG status is designated by the issuance of a certificate or badge by the County Director.
4. No obligations or responsibilities accrue to honorary MGs. Honorary MGs may continue to receive MG newsletters, programs, and event information by mail or via the local MG websites. Honorary MGs, however, will not have access to the Master Gardener Volunteer Management System (VMS) website unless they should return to certified active MG volunteer status.
5. Honorary MGs are not agents of UC, and are not covered by UC's self-insurance program.

C. Other UCCE MGP Volunteer Designations

1. At their discretion, the County Director may recognize MG volunteer service or MG service of a community member, on a local, County-by-County basis.
2. Such other forms of recognition might include (but are not limited to) different colored badges denoting hours/years of volunteer service, attached pins denoting areas of service, attached labels identifying MG volunteer membership in specific activities or projects, and so on.

XIII. NON-RENEWAL, SUSPENSION, AND/OR TERMINATION OF A MG
VOLUNTEER APPOINTMENT

- A. As used in this *Handbook*, the term "termination" should be construed to include "non-renewal" and/or "suspension" as may be applicable to the MG volunteer appointment.
- B. The County Director has responsibility and authority to terminate MG volunteers based upon their professional judgment and/or the recommendation of UCCE MGP staff.
- C. The UCCE County Director may not delegate termination responsibilities to UCCE MGP staff.
- D. The County Director may execute such a termination at any time.
- E. In the event of a decision to terminate a MG volunteer, the UCCE County Director will:
 1. Advise the Statewide Master Gardener Coordinator immediately, and
 2. Follow the below described termination procedures.

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- F. Causes of termination include but are not limited to:
1. Failure to demonstrate a supportive and cooperative attitude to UCCE MGP staff, MG volunteer peers, home gardeners, and/or other program stakeholders, as well as failure to adhere to the programmatic goals established by the UCCE MGP staff.
 2. Violation of the signed *Annual Volunteer Agreement* or UCCE MGP *Code of Conduct*.
 3. Performance of an act that violates UC policy and/or State or Federal law.
 4. Failure to meet the responsibilities of UCCE MGP volunteer service.
- G. Termination Procedures
1. Formal Review Process
 - a. The County Director will advise selected relevant personnel of the upcoming formal review, but will otherwise keep this information confidential to the greatest extent possible.
 - b. Relevant personnel may include (but are not limited to) the Statewide MGP Coordinator, the UCCE MGP staff, and others as needed to review the MG volunteer appointment. These individuals comprise the formal review committee.
 - c. At the discretion of the County Director, the MG volunteer may be suspended from UCCE MGP participation in part or in full during the period of formal review. The County Director may specify parameters of the suspension as they deem appropriate (partial suspension).
 - d. With the formal review committee, the County Director will review the MG volunteer appointment, as well as any relevant documentation.
 - e. At their discretion, the UCCE County Director may elect to include the MG volunteer at this or any other stage of the process.
 - f. The formal review committee will make a recommendation to the County Director regarding the proposed termination.
 - g. The County Director will issue written notification to the MG volunteer of the formal review of their MG volunteer appointment. Such notification will include:

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1. Citations of specific concerns and/or policy infractions.
 2. Statement of immediate and/or possible outcomes, including possible termination from the UCCE MGP.
 3. If applicable, notice of corrective action that could be taken by the MG volunteer to remedy the problem.
 4. If applicable, notice that the MG volunteer shall be given thirty (30) days to correct the infraction.
- h. The UC Statewide MGP Coordinator, and other appropriate ANR personnel shall be copied on the letter.
 - i. All such letters shall be sent via a verifiable delivery method (e.g., United States Postal Service Delivery Confirmation, Federal Express, etc.).
 - j. If after the thirty (30) day period, the UCCE County Director determines that the MG volunteer's actions were unsatisfactory and failed to remedy the situation, and/or if the problem reoccurs anytime thereafter, the UCCE County Director may give the MG volunteer written notification that the appointment is terminated (see Appendix 9). Further due process procedures do not apply in such instances, and may not be accessed by the MG volunteer.
2. Exception to Formal Review Process
 - a. On an exception basis, the County Director has discretion to waive the formal review process and terminate the MG volunteer immediately. Examples of situations in which the formal review process might be waived would include extreme disruption to the UCCE MGP, a potential threat to public safety, notice that the MG volunteer is the subject of a criminal investigation, and/or other conditions that cannot be remedied with corrective action.
 - b. In such a situation, the UCCE County Director will issue to the MG volunteer written notice of immediate termination without resort to the formal review process. Due process procedures will not apply in such instances, and may not be accessed by the MG volunteer.

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3. A MG volunteer who feels that his/her termination was made on an improper basis (e.g., civil rights discrimination or in retaliation of making a sexual harassment or civil rights complaint) has recourse through the MG volunteer complaint processes within ANR. Inquiries regarding the University's nondiscrimination policies may be directed to the Affirmative Action Contact: Linda Manton; DANR Building 225, Hopkins Road, Davis, CA 95616 (530) 752.0495,

**CHAPTER FOUR
TRAINING, QUALIFYING CONTINUING EDUCATION,
AND QUALIFYING SERVICE**

I. TRAINING RESPONSIBILITY

MG volunteers are independently and personally responsible for maintaining their technical skills and their involvement in the local MGP; and for fulfilling all educational, service, and other requirements necessary to become and/or retain status as a UCCE MGP volunteer.

II. UCCE MGP VOLUNTEER TRAINING (“MG VOLUNTEER TRAINEE” STATUS)

- A. Responsibility for the execution of the MGP training program rests with the County Director.
- B. Completion of the UCCE MGP volunteer training is one of the prerequisites necessary for appointment as a UCCE MG volunteer.
- C. MGP volunteer training is supported in part by mandatory fees that cover the costs of training materials and other expenses such as background investigations.
- D. The County Director may elect to provide training scholarships where deemed appropriate.
- E. Orientation
 - 1. One session of the multi-week MGP training program (usually the first), is usually devoted to an in-depth orientation to both ANR and the UCCE MGP.
 - 2. Orientation topics usually include basic information about UCCE and the UCCE MGP, as well as County-specific information as may be appropriate.
 - 3. Some counties choose to present the orientation material in an open informational session prior to the trainee selection and formal training. Such sessions may be helpful to individuals deciding whether they wish to commit to the intensive training and the volunteer service expected in the MGP.
 - 4. At the conclusion of the orientation session, MG volunteer trainees have the opportunity to affirm their commitment to the total training program

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and expected volunteer service by submitting the *Annual Volunteer Agreement*.

F. Health and Safety

In the course of the MGP training program, UCCE MGP staff must provide information on health and safety (see *Program Administration* below for additional details).

G. Civil Rights and Sexual Harassment Policies

In the course of the MGP training program, UCCE MGP staff must provide information on civil rights and sexual harassment policies.

H. MG volunteer training is scheduled in accordance with local needs. Classes are generally held weekly during consecutive months.

I. Each MG volunteer trainee is expected to participate in every training session. The number of class absences allowed and procedures for making up missed classes are determined by the County UCCE MGP staff.

J. The UCCE MG training program provides a basic, general, integrated, and practical course in horticulture, pest management, extension methodology, and UCCE MGP policies and procedures. Core training consists of a minimum of fifty (50) hours of instruction and includes the following basic subjects:

1. Orientation
2. Introduction to Horticulture (General Botany and Plant Physiology)
3. Soil and Fertilizer Management
4. Water Management in the Home Garden and Landscape
5. Controlling Garden Pests Safely (IPM)
6. Entomology
7. Plant Pathology
8. Weed Management
9. Vertebrate Pests
10. Vegetable Culture
11. Fruit Tree Culture
12. Turfgrass Management
13. Ornamental Plant Culture
14. Plant Problem Diagnosis (Including Abiotic Disorders)
15. Extension Teaching and Information Delivery
16. UCCE MGP Policies and Procedures (including MG volunteer generic job description and review of volunteer performance with signing of *Annual Volunteer Agreement*)

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- K. County UCCE MGPs may offer more than the minimum fifty (50) hours of core instruction; and, based on local needs, may include additional subjects such as household pests, diagnosing plant problems, indoor plant culture, subtropical/deciduous tree culture, herbs, propagation, bulbs, roses, and so on. Additional subjects for core training should not be credited for continuing education. Continuing education hours accrue after core training and graduation.
- L. Recommended training references include *The California Master Gardener Handbook* and other UCCE, ANR, and USDA resources that form the basis of the practical and useful research-based knowledge that volunteers extend to the public.

III. QUALIFYING CONTINUING EDUCATION ACTIVITIES (FIRST AND SUBSEQUENT YEARS OF UCCE MGP VOLUNTEER APPOINTMENT)

- A. All MG volunteers agree to participate in a minimum of twelve (12) hours of approved continuing education annually in subsequent years following their first certification year.
- B. Continuing education activities must be approved in advance by the UCCE County Director to assure that they meet UC standards. Examples of continuing education activities that are likely to be approved as qualifying include:
 - 1. Educational activities sponsored by the UCCE MGP such as the educational portion of UCCE MGP meetings, additional training classes, workshops, seminars, and conferences.
 - 2. Other educational activities approved in advance by the UCCE MGP staff.

IV. QUALIFYING SERVICE ACTIVITIES (FIRST AND SUBSEQUENT YEARS OF UCCE MGP VOLUNTEER APPOINTMENT)

- A. In their first year as MG volunteers, individuals agree to perform a minimum of fifty (50) hours of qualifying service activities.
- B. In their second and subsequent year as MG volunteers, individuals agree to perform a minimum of twenty-five (25) hours of qualifying service activities.
- C. Service activities must be approved in advance by the UCCE County Director to assure that they meet UC standards. Qualifying service activities must be consistent with UCCE MGP priorities, core issues and policy.
- D. Qualifying service activities must be performed free of charge. No payment to a MG volunteer may be solicited or accepted.

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- E. Qualifying service activities must be outreach and/or educational in nature, and/or must be UCCE programs. Examples of service activities that are likely to be approved as qualifying include:
1. Answering home gardening and pest management questions received by the UCCE MGP.
 2. Service on public education activities sponsored by the UCCE MGP including lectures, demonstrations, field trips, tours, plant clinics, exhibits, seminars, workshops, and conferences.
 3. Unpaid radio and television appearances representing UCCE MGP, if specifically approved by the County Director.
 4. Unpaid articles written for publication representing UCCE MGP. Copies of articles (or other written material) must be submitted to the County Director for review before publication.
 5. Organization and planning of UCCE MGP activities such as talks, plant clinics, educational exhibits and seminars, or assisting UCCE MGP staff with developing program direction and strategic planning.
 6. Preparation of art work, poster, fliers, displays, and other educational materials that benefit the UCCE MGP.
 7. Service on committees or as a coordinator for any UCCE MGP educational activity.
 8. Organization of reference materials and clerical or administrative work for the UCCE MGP.
 9. Service setting up and/or cleaning up UCCE MGP meetings and/or picking up and delivering supplies for a talk, clinic, exhibit, seminar, or other UCCE MGP function.
 10. Work on research projects and reports under the supervision of UCCE MGP staff for the purpose of developing and disseminating information on plant varieties and cultural practices.
- F. Examples of service activities that are likely to be disapproved as qualifying include:
1. Attendance at general UCCE MGP meetings (although the educational portion of such a meeting might count as continuing education as described above).

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2. Attendance at social meetings, holiday parties, and so on.
3. Work (whether paid or unpaid) for outside organizations (e.g., community groups, etc.) that satisfies the requirements for participation or membership in those organizations.
4. Any and all activities for which the MG volunteer is paid. However, the County Director has discretion to approve paid work on a very rare exception basis if they deem it appropriate.
5. Physical labor, such as for a community or school garden. However, the County Director has discretion to approve physical labor on an exception basis if its purpose is the demonstration of UCCE MGP methods.
6. Travel time to and from a volunteer activity. However, the County Director has discretion to approve travel on an exception basis if:
 - a. Travel is the actual job, such as transporting seminar or exhibit supplies, or
 - b. Travel is for a specific approved activity that is unusually distant from the MG volunteer's normal point of departure.

V. DOCUMENTATION OF QUALIFYING CONTINUING EDUCATION AND SERVICE ACTIVITIES

- A. Performance of qualifying continuing education and volunteer service activities must be documented digitally on the [UCCE MGP Volunteer Management System](#).
- B. MG volunteers are encouraged to retain a complete copy of their volunteer service and continuing education activities in their personal records.

VI. POLICY FOR PERFORMANCE OF MG VOLUNTEER SERVICE ACTIVITIES

- A. MG volunteers may make recommendations only on home and community gardening, non-commercial horticulture, and non-commercial pest management.
- B. If it is necessary to make recommendations regarding pesticides (e.g., insecticides, herbicides, fungicides), MG volunteers will do so only as per published UCCE recommendations.

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**VII. POLICY ON PESTICIDES AND RELATED CHEMICALS: USE BY MG
VOLUNTEERS**

- A. MG volunteers often have demonstration projects that may use pesticides (herbicides, insecticides, fungicides, etc.) as part of the management of the facility. It is recommended that pesticides be used as a last resort to manage garden and landscape pests. It is important that all pesticides be used in accordance with all applicable state and federal laws and regulations and label directions. UCCE MGP staff should approve pesticides before they are used for an MGP activity. For detailed information, see Appendix 11.
- B. MG volunteers shall report any pesticide incidents (including but not limited to spills, injuries, and symptoms of exposure) to the UCCE MGP staff as soon as possible. UCCE MGP staff will in turn immediately report all such incidents to the County Director, and will file an ANR Incident Report. Incident Report forms can be obtained from the [ANR Risk Services website](#).
- C. Non-Traditional Use of Household Products as Pesticides
 - 1. Household products or “home remedies” may not be recommended for use as pesticides unless UC has a published recommendation. If there is a published recommendation for household use products it is considered a non-traditional pesticide and it is approved on a case-by-case basis dependent upon the circumstances. Requests for such approval should be forwarded to the County Director, who will consult with Rick Melnicoe, ANR Statewide Pesticide Coordinator and Director, Western Region IPM Center.

CHAPTER FIVE PROGRAM ADMINISTRATION

I. INTRODUCTION

The following is a summary of certain key administrative policies that are particularly relevant in the UCCE MGP environment.

It is always best for UCCE County offices to first direct questions and concerns regarding administration to Business Operations Units (below) or the UC MG Statewide Coordinator.

Chief Administrative Officer
Business Operations Kearney
Cherie McDougald
559-646-6518
cmcdougald@uckac.edu

UCCE Statewide Master Gardener Program
Coordinator Pam Geisel
530-865-1154
pmelam@ucdavis.edu

Administrative Policy and Business Contracts Coordinator Catherine Montano at catherine.montano@ucop.edu or 510-987-0103 (also reference [website](#), and/or the ANR [Administrative Handbook](#) may also be consulted for further information.

II. ACCIDENTS, INJURIES AND/OR INCIDENTS

1. MG volunteers must immediately report to UCCE MGP staff any incident occurring while the MG volunteer is actively engaged in UCCE MGP activities.
2. Upon receipt of such a report, the UCCE MGP staff member will immediately forward the information to the UCCE County Director, who in turn will notify the ANR Risk Services Analyst by telephone, as well as by filing an [incident report](#).

III. BACKGROUND INVESTIGATION

- A. ANR background investigation procedures require that all MG volunteers be screened through the California Department of Justice (DOJ) [criminal record system](#). This policy on background investigation (*ANR Background Investigation Procedures Manual*) applies to all UCCE volunteers and can be found on ANR's [website](#).
- B. The DOJ maintains an authorized list for UCCE/4-H/MGP, organized by California counties. For example, all UCCE volunteer prints submitted from

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Alameda county are designated as “Alameda 4-H.” The DOJ prefers that submissions for the UCCE MGP or other volunteer groups use this same basic designation (Volunteer/4-H Leader/MGP11105.3PC) in the “Job Title or Type of License, Certification or Permit” line of the [Request for Live Scan Service form](#). Anyone (including non-US citizens) can potentially participate in the background investigation process as long as they have a valid photo I.D. (California Driver’s License) or a social security number.

- C. California Penal Code Section 11105.2 allows Subsequent Arrest Notification (SAN). The Department of Justice may provide SAN to any agency authorized by Section 11105 to receive state summary criminal history information to assist in fulfilling employment, licensing, certification duties, or the duties of approving relative caregivers and nonrelative extended family members, upon the arrest of any person whose fingerprints are maintained on file at the Department of Justice (DOJ) as the result of an application for licensing, employment, certification, or approval. The notification shall consist of a current copy of the person's state summary criminal history transcript.
- D. Any ANR Unit (county, statewide office, etc.) receiving a Notification of Subsequent Arrest (NSA) **Subsequent Arrest Notification (SAN)** for any person(s) employed or in a volunteer capacity (volunteers) should immediately contact their immediate supervisor, Risk Services Analyst Linda Harris (510 987-0085 or linda.harris@ucop.edu) **(530 752-7481 or lharris@ucdavis.edu)**, and the Statewide Program Director (if applicable). Once the parties have been notified, ANR will work together to determine why the SAN was received and what is the best approach to address the information and determine what action if any is required.
- E. Anyone receiving a NSA for any person(s) unknown to the ANR unit, or for any person(s) no longer employed by the ANR unit or acting in a volunteer capacity, should immediately return the NSA **SAN** to the DOJ, informing them that the ANR unit is No Longer Interested in the applicant. It is important not to record or otherwise retain any information received as a result of the SAN.

IV. COMPLAINT PROCESS FOR MG VOLUNTEERS (Formal and Informal)

- A. General
 - 1. MG volunteer complaints of all sorts; including but not limited to topics such as UCCE programs, policy, personnel, or procedures; will generally be resolved using the procedure described below.
 - 2. MG volunteer complaints are resolved at the local (i.e., UCCE County office) level.

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3. MG volunteer complaints will not be referred to Statewide MGP Coordinator (or other ANR senior management, with the exception of such a complaint made specifically against the UCCE County Director.
4. MG volunteers are personally responsible for the resolution of disputes with other MG volunteers, and such disputes will not be considered under the formal complaint process.
5. All information (both verbal and written) related to MG volunteer complaints is held in confidence to the greatest extent permissible by UC policy and State law.
6. Sexual Harassment/Civil Rights Complaints
 - a. Sexual harassment and/or civil rights complaints must be brought to the attention of the ANR Director of Affirmative Action.
 - b. Program civil rights complaints may be filed with the Secretary of Agriculture, United States Department of Agriculture, Washington, DC 20250 within 180 days from the date of the alleged discrimination.
 - c. The process to use for these complaints may differ from that described here. For additional information, contact the Affirmative Action contact at lmanton@ucdavis.edu .

B. Informal MG Volunteer Complaint Process

1. Informal resolution of MG volunteer complaints is always preferable although not mandatory. A MG volunteer is at liberty to seek resolution solely through formal review if they so desire.
2. As one would assume, the informal complaint process simply involves the MG volunteer communicating with the County Director and/or UCCE MGP staff, engaging in dialogue, and identifying a mutually satisfactory resolution.
3. If a mutually satisfactory resolution cannot be achieved through the informal complaint process, the MG volunteer may make a formal complaint

C. Formal MG Volunteer Complaint Process

1. The MG volunteer may initiate the formal complaint process by issuing a written complaint to the UCCE County Director. The written complaint must include specific details and the remedy requested.

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2. If attempt was made to resolve the matter informally, the formal complaint must be received by the County Director within thirty (30) calendar days of the completion of that informal process.
 3. If no attempt was made to resolve the matter informally, the formal complaint must be received by the UCCE County Director within thirty (30) calendar days of the event that gave rise to the complaint.
 4. Upon receipt of the formal MG volunteer complaint, the County Director must forward a copy of the complaint to the Statewide Master Gardener Coordinator (or other ANR senior management).
 5. The County Director will then review the formal complaint.
 - a. At their discretion, the County Director may seek input on the formal complaint from selected relevant personnel. Such relevant personnel might include (but would not be limited to), the Statewide MGP Coordinator, the UCCE MGP staff, and others. The County Director may also review any relevant documentation or other material as they deem appropriate.
 - b. At their discretion, the UCCE County Director may elect to include the MG volunteer at this or any other stage of the process.
 - c. Within thirty (30) days of their receipt of the formal complaint the County Director will issue written notification to the MG volunteer of the resolution of their concern. Such notification will include:
 1. Summary of the complaint.
 2. Issues considered by the County Director.
 3. Specific action (if any) to be taken to resolve the matter, including identification of relevant personnel as well as a general timeline.
 - d. The Statewide MGP Coordinator, and other appropriate ANR personnel shall be copied on the County Director's formal complaint response letter.
 - e. All such letters shall be sent via a verifiable delivery method (e.g., United States Postal Service Delivery Confirmation, Federal Express, etc.).
- D. Appeal of Response to the MG Volunteer's Formal Complaint

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1. In the event that the MG volunteer is not satisfied with the County Director's decision regarding the formal complaint, the following appeal process will be observed.
 - a. The MG volunteer may appeal in writing to the UC Statewide MGP Coordinator no later than thirty (30) calendar days after the MG volunteer's receipt of the County Director's written response to the formal complaint.
 - b. The UC Statewide MGP Coordinator will advise the County Director that an appeal has been received.
 - c. The County Director will forward all related information to the UC Statewide MGP Coordinator.
 - d. The Statewide MGP Coordinator will consider the appeal. In doing so, the Statewide MGP Coordinator may consult with any individual and/or review any documentation as appropriate in their judgment.
 - e. Within thirty (30) days of their receipt of the appeal, the UC Statewide MGP Coordinator will issue written notification to the MG volunteer of their judgment of the appeal. Such notification will include:
 1. Summary of the complaint and appeal.
 2. Issues considered by the UC Statewide MGP Coordinator.
 3. Decision of the UC Statewide MGP Coordinator, including if applicable, specific action to be taken.
 - f. The UCCE County Director, the Statewide MGP Coordinator, the Associate Vice President for Programs and other appropriate ANR personnel shall be copied on the UC Statewide MGP Coordinator appeal response letter.
 - g. All such letters shall be sent via a verifiable delivery method (e.g., United States Postal Service Delivery Confirmation, Federal Express, etc.).
2. The decision of the UC Statewide MGP Coordinator will be final and no further recourse will be available to the MG volunteer.

V. CONFIDENTIALITY AND PRIVACY

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- A. As a general practice, private information (e.g., addresses, phone numbers, etc.) of members of the public should not be collected or retained by UCCE.
- B. Although UCCE will treat all private information as confidential to the greatest extent permitted by statute and UC policy, complete confidentiality is not guaranteed. For example, in the event of a subpoena or written records request, UC may be required to disclose copies of documents and other information as required by law.

VI. CONFLICT OF INTEREST and/or CONFLICT OF COMMITMENT

- A. UC policy is that none of its faculty, staff, and/or volunteers shall engage in any activities that place them in a conflict of commitment and/or of interest between their official activities and any other obligation. Such conflicts may interfere with the individual's ability to meet his or her UC obligations, or may create a potential or actual conflict of commitment or interest, or the appearance of same.
- B. The County Director has responsibility and authority to so designate those activities that, in their opinion as County Director, constitute a Conflict of Interest and/or a Conflict of Commitment.

VII. CONTRACTS AND GRANTS

Refer to the [ANR Administrative Handbook](#) and the [UCCE Procedures Guide](#)) for information on applying for and processing grants and contracts, including the possible hiring of UCCE MGP staff with those resources.

VIII. COST RECOVERY

Cost recovery for MGP activities is allowed and encouraged. Cost recovery allows for all expenses attributable to a given activity may be included when developing the budget for that activity, and thus determining a cost-per-person fee. Further information is available in the [ANR Administrative Handbook](#).

IX. EMAIL AND WEBSITES

- A. General
 - 1. UC encourages the use of electronic communications resources and makes them widely available to the UC community in support of UC's teaching, research, and public service mission; and of the administrative functions that support this mission.
 - 2. UC electronic communications resources may not be used for:

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- a. Unlawful activities.
 - b. Commercial and/or political purposes not under the auspices of UC.
 - c. Personal use including personal financial gain.
 - d. Uses that violate other UC policies or guidelines (e.g., intellectual property and sexual or other forms of harassment).
 - e. Any other use that is considered inappropriate in the judgment of the UCCE County Director.
3. In the context of the UCCE MGP, the County Director has responsibility and authority for all UC electronic resources, specifically including all websites and email accounts.

B. Websites

1. UCCE MGP websites should be initiated only when local resources allow for the regular review of the website to ensure accuracy and quality of information. To the extent that local resources permit, UCCE MGP staff review of websites that contain MG volunteer input is encouraged, in order to ensure accuracy and quality of information.
2. In the context of the UCCE MGP, the County Director has responsibility and authority over local UCCE MGP websites, specifically including all content therein.

C. Email

1. At the discretion of the County Director, email accounts may be established for the local UCCE MGP. Such accounts are not specific to a single individual; rather, they are issued for use by the local MGP as a whole.
2. Email accounts may be requested by contacting the Statewide MGP
3. The UCCE MGP staff has discretion to review any and all email responses to gardening queries that have been prepared by MG volunteers. To the extent that local resources permit, UCCE MGP staff review of emails prepared by MG volunteers is encouraged, in order to ensure accuracy and quality of information.

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4. In the context of the UCCE MGP, the County Director has responsibility and authority over the UCCE MGP email account, specifically including all content therein.

X. FACILITIES USE AGREEMENTS (FUAs) FOR MGP ACTIVITIES

- A. When the UCCE MGP utilizes non-UC facilities for programs, meetings and other activities, a facilities use agreement (FUA) may be required prior to using those facilities.
- B. Questions may be directed to Risk Services Analyst Linda Harris at 510-987-0085 or olharris.ucdavis.edu, website [ANR Risk Services](#) and/or the ANR [Administrative Handbook](#), Sections 208 and 209 may be consulted for further detail.
- C. The procedure for processing facilities use agreements (FUAs) is as follows.
 1. A minimum of ten (10) working days should be allowed for processing FUAs. This will require advance planning on the part of UCCE MGP staff and MG volunteers. The ANR Risk Services Analyst provides advice and reviews FUAs, in addition to issuing insurance certificates.
 2. Once an FUA has been properly negotiated and executed, it is forwarded to the ANR Risk Services Analyst if an insurance certificate is required.
 3. UCCE County Directors (with the assistance of the ANR Risk Services Analyst as needed) may execute FUAs that do not contain a hold harmless clause, or that contain a hold harmless clause that does not conform to UC's preferred language.
 4. Such FUAs should be carefully reviewed by the County Director to determine that there are no other provisions that would be detrimental to UC interests.
 5. Note that hold harmless or other indemnification terms may be hidden in other clauses and may not be specifically identified as "indemnification."
- D. Insurance Certificates
 1. An insurance certificate provides documented evidence of insurance coverage by one party for purposes of protecting the interests of the other party.

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2. Most UCCE MGP requests for insurance certificates are related to agreements to use outside (non-UC) facilities, and thereby allow the UCCE MGP to carry out programs in the community. However, insurance certificates can be required in connection with UC activities of all sorts.
3. A minimum of ten (10) working days should be allowed for processing requests for insurance certificates. The request for certificate of insurance must include the following information:
 - a. Name and address of the entity to which the certificate is to be issued,
 - b. Whether or not the entity requires to be named as an “additional insured,”
 - c. Limits of insurance coverage required by the entity,
 - d. Effective dates and hours of use for coverage (from -- to). (Absent more specific information, insurance certificates are issued with a standard 30-day notification clause for cancellation of coverage),
 - e. Reason why the certificate is needed, including a brief description of the activity planned, and
 - f. Name and address of the responsible UCCE MGP staff member.
 - g. Forward completed requests for certificates of insurance, along with FUA and any attachments to:

Risk Services Analyst Linda Harris
olharris@ucdavis.edu
530 752-7481 or 510 987-0965 (voice)

XI. GENERAL AND FINANCIAL ADMINISTRATIVE REQUIREMENTS

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- A. UC is a public tax-supported institution of higher learning with 501(c)(3) Tax Code status.
- B. All monies received by UCCE in support of the local MGP are considered public funds and are handled according to UC policies.
- C. The UCCE MGP fiscal/program year begins July 1 and ends the following June 30. The County Director has discretion to adjust these dates to meet local programmatic needs.
- D. The UCCE MGP must collect sales tax on retail items sold, except where those items are consumables such as tomato plants and seeds. Sales tax must be collected and submitted to the Business Operations Office-Kearney for processing according to the [Procedures Guide](#).
- E. Management oversight of the UCCE MGP in California is the responsibility of the ANR division of UC. However, UCCE MGP is administered at the local level by the County UCCE office. The UCCE County Directors bear responsibility and authority for the management of the County-based UCCE MGP.
- F. A MG volunteer may request reimbursement of out-of-pocket costs associated with service activities, such as copying and travel expenses. MG volunteers must request reimbursement approval from the UCCE MGP staff prior to incurring any such expenses.
- G. MG volunteers may not negotiate and/or sign any document that commits University in any way, including but not limited to licenses, facility use agreements, contracts and grants,
- H. All UCCE MGP meetings are to be open to all MG volunteers unless, in the judgment of the County Director, the meeting is of a confidential or sensitive nature.
- I. MG volunteers may purchase UCCE publications at reduced costs directly from ANR Communication Services. See the UCCE MGP staff for further information.

XII. GIFTS (TO UCCE MGP)

- A. In this context, donations refers to gifts of both money and things (a.k.a. “in-kind donations”).

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- B. MG volunteers should refer all potential donors to the UCCE County Director for further action.
- C. In accordance with UC policy, the ways in which the UCCE MGP may acknowledge gifts is limited as follows.
 - 1. Recognition of gifts may be made by listing the donor's name in printed material, on banners, or other signage.
 - 2. Gifts may not be acknowledged by displaying corporate logos, marketing materials, web links, or other forms of promotion and/or endorsement.
 - 3. The specific amount of the gift may not be stated, however, donors may be broadly categorized by gift amount (e.g., \$100 to \$1,000, \$1,001 to \$10,000, and so on).

XIII. GIFTS (TO MG VOLUNTEERS)

With approval of the County Director, non-transferable gifts valued at no more than seventy-five dollars (\$75.00) may be given to MG volunteers and/or other key stakeholders in acknowledgment of their UCCE MGP volunteer service or other relevant contributions.

XIV. HANDBOOK ADMINISTRATION

A. Handbook Purpose

- 1. The purpose of this *Handbook* is to set forth the operating policies and procedures for County UCCE MGPs. These policies and procedures are defined within broader policies of UC as a whole and ANR in particular. (See [ANR Administrative Handbook](#) and other applicable [UC policy documents](#).)
- 2. This *Handbook* is written for implementation by all UCCE administrators and UCCE MGP staff who have responsibility for MG volunteer management and support in County UCCE MGPs. "UCCE MGP staff" is the term used throughout the *Handbook* to denote specialists, advisors, program representatives, and County-paid staff hired to conduct the UCCE MGP. It is assumed that UCCE administrators and UCCE MGP staff have access to and are familiar with the [ANR Administrative Handbook](#). The contents of this *Handbook* apply, as appropriate, to UCCE MGP staff, MG volunteers, and clientele who benefit from the UCCE MGP.
- 3. This *Handbook* is designed to provide policies and implementing procedures that are relevant to the UCCE MGP. The goal is to designate those areas of UCCE MGP operations and MG volunteer activity where

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statewide uniformity and consistency are required and/or desirable within UC and ANR policies and guidelines, and to allow for County-by-County variation and flexibility in other matters to improve program effectiveness and efficiency in meeting local needs.

4. In addition to UCCE MGP statewide policies and procedures outlined in this *Handbook*, local County-based UCCE MGP staff may establish local procedures with the approval of the UCCE County Director, provided that such procedures do not conflict with the intent or actual content of the policy information provided herein.

B. Handbook Issuance

1. This *Handbook* is issued via the [ANR website](#), where the most current version may always be found. It is available to all interested persons.
2. In collaboration with the Statewide MGP Coordinator, the ANR Office of the Controller and Business Services Director (OCBS) is responsible for the issuance of this *Handbook* and any necessary revisions.

C. Handbook Revision

1. Proposed revisions and/or comments should be submitted to the UCCE County Director or other responsible ANR administrator as appropriate.
2. The County Director will forward proposed revisions to the Statewide MGP Coordinator.

Pam Geisel
Agriculture and Natural Resources
UCCE Statewide Master Gardener Program Coordinator
pmelam@ucdavis.edu
[Statewide Master Gardener Program](#)

3. All proposed revisions will be reviewed by the Statewide MGP Coordinator, who may revise or reject proposed changes, notifying those who proposed them of that decision.
4. As per the judgment of the Statewide MGP Coordinator, proposed revisions may be submitted to the MGP Policy Committee, the MGP Steering/Advisory Committee, or other stakeholder groups for further consideration.
5. When and if proposed revisions are agreed upon by stakeholder groups and approved by the Statewide MGP Coordinator, revisions will then be

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forwarded to ANR’s Office of the Controller and Business Services Director (OCBS).

6. OCBS will ascertain whether legal or other external review is needed and, if so, make necessary arrangements for such review. External review recommendations, if any, will be submitted to the Statewide MGP Coordinator for approval.
7. Substantive revisions will be transmitted from the Statewide MGP Coordinator to the ANR Associate Vice President for conceptual approval.
8. Fully-approved revisions will be incorporated into this *Handbook*, by OCBS:

Catherine Montano
Agriculture and Natural Resources
Coordinator, Administrative Policies and Business Contracts
<mailto:catherine.montano@ucop.edu>
[Administrative Policies and Business Contracts](#)

D. *Handbook* Definitions

As used throughout this *Handbook*, the following terms will be understood as follows:

“UC”	University of California
“ANR”	Agriculture and Natural Resources, a statewide network of UC researchers and educators dedicated to the creation, development and application of knowledge in agricultural, natural and human resources.
“UCCE”	UC Cooperative Extension, ANR’s outreach arm.
“County”	The local-level UCCE office, which is administered by the UCCE County Director.
“County Director”	The head of the UCCE organization at the local level. Includes by inference any UCCE staff member to whom the UCCE County Director has delegated responsibility and/or authority.
“UCCE MGP”	The UC Master Gardener Program, a UCCE program that uses UC-trained volunteers to extend research-based information to the public about home horticulture and pest management.

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"UCCE MGP staff"	UC Specialists, advisors, program representatives, and county-paid staff located in the County (local) office and responsible for conducting the local UCCE MGP. All references to the UCCE MGP staff will include by inference the County Director, who has discretion to retain any of the responsibilities of the UCCE MGP staff, based on the County Director's best judgment.
"Statewide MGP Coordinator"	The Statewide MGP Coordinator is an administrative and programmatic resource for the UCCE MGP throughout California.
"MG Volunteer"	Indicates a qualified individual who has been appointed as a MG volunteer by the County Director to assist UCCE in the execution of the MGP. Also known as "appointed volunteer", "reappointed volunteer," "current volunteer" and "active volunteer."
"Limited Active Status"	Designation given on exception basis allowing the MG volunteer to maintain their "active" status while temporarily unable to fulfill the UCCE MGP MG volunteer requirements.
"Inactive Status"	Indicates that MG volunteer did not fulfill the annual reappointment requirements in a timely manner and is no longer an appointed MG volunteer; thus she/he cannot participate in UCCE MGP activities, is not considered an agent of UC, and is not eligible for UC liability coverage.
"Reinstatement"	Process by which an "inactive" MG volunteer may apply to resume their participation in the UCCE MGP, and regain their standing as an appointed "MG volunteer."
"Resigned Status"	Indicates that MG volunteer did not fulfill the reinstatement requirements and is no longer an appointed MG volunteer; thus s/he cannot participate in UCCE MGP activities, is not considered an agent of UC, and is not eligible for UC liability coverage.
"Certification"	Indicates that MG volunteer trainee has completed the UCCE MGP academic training program, and has passed the associated qualifying examination.
"MG Volunteer Trainee"	Applicant currently enrolled in their County's UCCE MGP volunteer training program. Also known as "interns," or "apprentices."
"Clientele"	Members of the public who make use of UCCE MGP services.

XV. HEALTH AND SAFETY

- A. The University is committed to maintaining the safety and health of UCCE employees, volunteers and clientele. Every employee or volunteer has a responsibility to follow safety rules and procedures and to help identify and correct potentially hazardous conditions. Prior to starting a new activity,

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employees and volunteers should consider the potentially hazardous conditions and the steps they should take to prevent injury or illness, including whether they have the proper training and equipment to safely perform the task. Questions may be directed to [ANR Environmental Health and Safety](#) (EH&S) Manager Brian Oatman at 530-752-6024 or baoatman@ucdavis.edu.

B. Training

1. Health and Safety is a topic of the core UCCE MGP training, and includes (but is not limited to) topics such as:
 - a. UCCE *Master Gardener Thinking Safe and Green* sheets available at <http://safety.ucanr.org/mg>.
 - b. Pesticide use.
 - c. Garden tools and equipment use.
 - d. Safe lifting and other ergonomic topics.
 - e. Heat illness awareness.
 - f. UCCE [Master Gardener Safety Manual](#)
 - g. Procedures for reporting safety concerns, hazards, and injuries.

As UCCE MGP meetings are held in a variety of different locations it is important that MG volunteers know what to do in the event of an emergency at that specific site. Information such as emergency phone numbers, evacuation procedures, locations of meeting room and/or building exits; location of the nearest phone, fire alarms, fire extinguishers; and route to the closest hospital or clinic should be compiled and available at the meeting site.

If a serious injury occurs, MG volunteers shall immediately contact Emergency Medical Services (call 911). MG volunteers should treat minor injuries with first aid.

- h. Food Safety.
 1. Food service activities must be in compliance with all local (city and county) health department rules and state law, and must be conducted as per ANR guidelines.
 2. Failure to comply with these requirements may cause a transference of liability from UC to those serving the food,

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making them personally liable for their actions in the event that legal claims of negligence arise.

3. Food safety information is available at http://groups.ucanr.org/foodsafetyvolunteer/Make_it_Safe-Keep_it_Safe/.
 2. MG volunteers are encouraged to participate in safety training programs sponsored by UC.
- C. Alcohol, Illegal Drugs, and Tobacco
1. MG volunteers shall not consume or be under the influence of alcohol or illegal drugs while performing UCCE MGP duties.
 2. If alcohol is to be consumed, the UCCE MGP activity must be officially adjourned, and the MG volunteer should remove their UCCE MGP badge prior to participating.
 3. UCCE MGP activities are conducted under tobacco-free conditions.
- D. Interaction with Youth

In the context of the UCCE MGP, MG volunteers are strongly discouraged from working directly with youth, but are encouraged to work with other qualified adults who do so (such as a UCCE 4-H staff member or school teacher). If the MG volunteer would like to work directly with youth, they are encouraged to consider volunteering in [the 4-H Youth Development Program](#).

XVI. HONORARIA

- A. MG volunteers may not be paid an honorarium for services related to educational programs.
- B. In lieu of an honorarium to the individual MG volunteer, client or community donations may be accepted by the UCCE County Director to benefit the local UCCE MGP, or by the California Master Gardener Endowment.
- C. Actual out-of-pocket expenses may be reimbursable if approved by the County Director. See “General and Financial Administrative Requirements.”

XVII. MAILING LISTS

- A. The sole purpose of UCCE mailing lists is to deliver educational information.

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- B. In accordance with UC policy, no UC mailing list will be given to other non-UC organizations or individuals.
- C. With the permission of the MG volunteers, the County UCCE MGP may compile a list of MG volunteer addresses and phone numbers for distribution to individuals on that same list. No external distribution of such a list is allowed.

XVIII. MASTER GARDENER ASSOCIATIONS (MGAs) SEPARATELY INCORPORATED PRIOR TO 1996

- A. Prior to 1996, UC policy allowed for the separate incorporation of UC support groups, and MG volunteers in a few counties formed separately incorporated non-profit 501(c)(3) organizations in support of the County-based UCCE MGP. The UCCE MGP is grateful for the outstanding dedication to the UCCE MGP demonstrated by the members of these separately incorporated MGAs.
- B. To the extent that such existing separately incorporated MGAs make use of the UC/ANR/MGP name in any way, such MGAs are subject to [UC Support Group policy](#).
- C. Current UC Support Group policy prohibits formation of new separately incorporated organizations under the auspices of UC, ANR, and/or the UCCE MGP.
- D. The activities of existing separately incorporated MGAs are subject to the prior approval of the UCCE County Director, as well as to the subsequent oversight of UCCE MGP staff.

XIX. NEWSLETTERS

- A. Newsletters are an important communications tool for the UCCE MGP that may be used to communicate information:
 - 1. That is programmatically appropriate, and
 - 2. That relates directly to the UCCE MGP core issues and/or communicates impacts, effectiveness and achievements of the program.
- B. Overly personal communication, inappropriate material, and material that is unrelated to UCCE MGP business should be avoided.
- C. UCCE MGP newsletters must include the most [current ANR Non Discrimination Policy](#) the [ANR logo](#)), the [Statewide MGP logo](#), and the County-specific UCCE MGP logo (if one exists).

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XX. NAME AND LOGO – UC, ANR, MGP, AND/OR UCCE COUNTY

- A. The UCCE MGP name and logo are the property of UCCE.
- B. UC’s name and logo, as well as the UCCE Master Gardener Program name and logo, may not be used in a manner which would appear to endorse and/or oppose any commercial, political or religious interest. Reference the [California Education Code Section 92000-92001](#),
- C. For purposes of the UCCE MGP, the UCCE County Director has the responsibility and authority to approve or disapprove use of the UCCE/MGP names and logos.
- D. The UCCE MGP logo represents the MGP with a statewide identity and a unified voice and vision. In accompaniment with the UCCE ANR logo, the UCCE MGP logo should be used as regularly as possible and applied to all relevant program materials such as name badges, appointment cards, etc.
- E. The ANR logo is the unifying symbol for ANR and encompasses the Agricultural Experiment Station, UC Cooperative Extension, and the many ANR Statewide Programs. In accompaniment with the UCCE MGP logo, the ANR logo should be used as regularly as possible and applied to all relevant program materials.
- F. If the UCCE County office has a logo, it may also be used in conjunction with the MGP and ANR logos.
- G. Information on the ANR logo may be found [here](#) .
- H. Information on the MGP logo is available [here](#)
- I. The term “UCCE Master Gardener Program” (“UCCE MGP”) is used statewide and throughout this *Handbook*. When referring to a specific County MGP, the naming convention to be used is: UCCE Master Gardeners of {County name} county.
- J. The title “Master Gardener volunteer,” as well as the UCCE MGP name badge may only be used by appointed MG volunteers, and only when they are in the course and scope of their UCCE MGP volunteer activities. It may not be used for commercial purposes. However, the training, experience, and certification gained by individuals in the UCCE MGP may be referenced as personal qualifications (e.g., when seeking employment, etc.).

XXI. NONDISCRIMINATION/AFFIRMATIVE ACTION POLICY

- A. The University of California prohibits discrimination or harassment of any person on the basis of race, color, national origin, religion, sex, gender identity, pregnancy (including childbirth, and medical conditions related to pregnancy or childbirth), physical or mental disability, medical condition (cancer-related or genetic characteristics), ancestry, marital status, age, sexual orientation, citizenship, or status as a covered veteran (covered veterans are special disabled veterans, recently separated veterans, Vietnam era veterans, or any other veterans who served on active duty during a war or in a campaign or expedition for which a campaign badge has been authorized) in any of its programs or activities.
- B. UC policy is intended to be consistent with the provisions of applicable State and Federal laws.
- C. Inquiries regarding the University's nondiscrimination policies may be directed to the Affirmative Action Contact, Linda Manton Agriculture and Natural Resources, ANR Building 225; One Hopkins Road, Davis, CA 95616 -8575 (530)752-0495 lmanton@ucdavis.edu

XXII. RECORDS REQUESTS

Immediately upon receipt of a request for records (including those made pursuant to the California Public Records Act, as well as subpoenas) the requesting document should be forwarded to Administrative Policies and Business Contracts Coordinator Montano (catherine.montano@ucop.edu or 510-987-0103) for discussion and action.

XXIII. RECORDS RETENTION

All MG volunteer records should be kept during the subject program year. Once that year has ended, those records must be destroyed and replaced with the current year's files. Records on MG volunteers who are no longer appointed must be retained for five (5) years and then must be destroyed.

XXIV. RISK MANAGEMENT

- A. Insurance and General Liability
 - 1. UC maintains self-insurance programs for general liability that protect all employees and agents of UC while acting within the course and scope of UC business.
 - 2. In the event of accidental damage to another's property, or accidental injury to another person during the conduct of official UC business, or as a result of negligence on the part of its employees or agents, UC and its

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employees and agents are protected by UC's general liability self-insurance program. MG volunteers are UC agents when actively engaged in the course and scope of UC volunteer activities and thus are covered. No coverage applies or is implied for any other reason.

3. The UC self-insurance program for general liability coverage protects MG volunteers when they:
 - a. Have been appointed as an UCCE MG volunteer in accordance with the above-described requirements, and
 - b. Are acting within the course and scope of their duties as a UCCE MG volunteer.
4. In the event of accidental damage to another's property, or accidental injury to another person during the conduct of official UC business, and as the result of negligence by a MG volunteer, UC and the MG volunteer are protected against and from third party suits or claims. The University of California Self-Insurance Program for general liability does not provide coverage for the personal property (including homes, gardens or equipment) of UCCE MGP staff or MG volunteers. UCCE MGP staff and MG volunteers who utilize their personal property during the course of UCCE MGP activities should check with their insurance carrier and review their liability coverage.
 - a. When, during the course of their UCCE MGP duties, a MG volunteer is involved in accidental injury or property damage to others, he or she must immediately report full details to the UCCE MGP staff.
 - b. Upon receipt of such a report, the UCCE MGP staff member will immediately forward the information to the UCCE County Director, who in turn will notify the ANR Risk Services Analyst by telephone, as well as by filing an [incident report](#).
5. MG volunteers are not covered by UC's Workers' Compensation program.

B. Automotive Insurance and Liability

1. If driving is part of the MG volunteer duties, the individual must follow California driving regulations and comply with the following standards:
 - a. Provide evidence of a valid California driver's license,
 - b. UC policy requires employees or volunteers who are driving on UC business to maintain insurance coverage in the following

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amounts: \$50,000 for personal injury to, or death of, one person; \$100,000 for injury to, or death of, two or more persons in one accident; and \$50,000 for property damage. These limits are commonly referred to as: “50/100/50.” These UC minimum insurance requirements are higher than the State minimum insurance requirements of 15/30/5.

- c. Use a safe operating vehicle, and
 - d. Have seat belts for each passenger.
2. In the event of an automobile accident claim, compensation would be applied for as follows:
- a. The MG volunteer’s personal automobile liability insurance would be primary (first).
 - b. UC self-insurance would be excess (secondary, or above the primary coverage).
 - c. If an accident is not due to UC’s (or the MG volunteer’s) negligence, reimbursement of claims for liability must be sought from the negligent party through the MG volunteer’s insurance provider.
3. The County Director has the responsibility and authority to determine whether or not MG volunteers may make use of County vehicles in the course of their UCCE MGP duties.
4. UCCE MGP staff are responsible for notifying volunteers of the laws and regulations pertaining to use of automobiles in UCCE MGP activities. This can be accomplished through newsletters, orientation meetings, and workshops.

C. Waiver of Liability

The purpose of the waiver of liability is to protect UC and its employees from legal liability for injuries that may occur to individuals who participate in voluntary activities affiliated with UC. On a project-specific basis, and in accordance with the degree of risk associated with that project, UC may require that volunteers sign the *Waiver of Liability, Assumption of Risk, and Indemnity Agreement* (Appendix 12). The format and language of the waiver cannot be changed or edited by the MG volunteer or by UCCE staff. See Appendix 13 for more *information*.

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