

# BBE VOLUNTEER APPOINTMENT PROCESS

## VOLUNTEER APPOINTMENT PROCESS/CHECKLIST:

	Request volunteer forms from division office (Stefany)
	Complete forms and return to division office
	<ul style="list-style-type: none"> <li>Form to Return: Volunteer Data Sheet</li> </ul>
	<ul style="list-style-type: none"> <li>Form to Return: Volunteer Agreement and Release Form</li> </ul>
	<ul style="list-style-type: none"> <li>Form to Return: Confidentiality and Non-Disclosure Agreement</li> </ul>
	<ul style="list-style-type: none"> <li>Form to Return: Patent Agreement</li> </ul>
	Division office will review and approve, then send forms to <a href="mailto:hrinfo@caltech.edu">hrinfo@caltech.edu</a> for processing
	HR will send email to division office once volunteer is set up in system; division will forward to lab contact
	Lab contact must email IMSS security to request system access account and email
	Lab contact must assist volunteer with obtaining an access account ( <a href="http://help.caltech.edu">help.caltech.edu</a> ) and UID card ( <a href="mailto:cardoffice@caltech.edu">cardoffice@caltech.edu</a> ) – if needed
	For access to BBE buildings (key and card access), lab contact must send email to <a href="mailto:bbeaccess@caltech.edu">bbeaccess@caltech.edu</a> , and include a scan of the Lab Safety Orientation Checklist

## FORMS:

### Volunteer Data Sheet:

	Complete items in red
	Provide UID if available
	Get volunteer to sign and date
	Must include start and end date
	Division is BBE and Mail Code is MC 156-29
	Add detailed description of volunteer activity
	Sponsor signature and date bottom of page

### Volunteer Agreement and Release Form:

	Page 1: Enter start and end date of appointment
	Page 1: Enter working status
	Page 1: Enter name of office to notify which is BBE
	Page 2: Enter hours per day, per week or per year
	Page 2: Volunteers signature and date with home address and emergency contact info

### Confidentiality and Non-Disclosure Agreement:

	Page 1: Add volunteer name
	Page 2: Volunteer date and sign

### Patent Agreement:

	Volunteer sign and date and print name
--	--

For questions, please contact Stefany Nielsen at (626) 395-4700 or [snielsen@caltech.edu](mailto:snielsen@caltech.edu).

# BBE VOLUNTEER APPOINTMENT PROCESS

## VOLUNTEER GUIDELINES FROM HR WEBSITE:

<https://hr.caltech.edu/resources/notices-administrative-guidelines/volunteer-guidelines>

### Volunteer Description

Caltech understands the important role volunteers play in supporting the Institute's research and education mission. The following guidelines have been established to ensure that the relationship between volunteers and the Institute is clearly identified and understood by everyone involved.

### Introduction

Caltech recognizes the need to balance the desirability of volunteer service with the need to protect the Volunteer's interests and the need to minimize risk to both the Volunteer and the Institute. The following guidelines and procedures address the various issues that may arise as Divisions or Departments seek to engage and maintain volunteers. Note: The responsibility for proper screening and engagement of volunteers' rests with the Divisions or Departments.

### Unpaid Academic Appointments

Individuals who have unpaid academic appointments to the Institute are not considered volunteers when acting in that capacity, they are permitted to volunteer if they are visiting from their home institutions and do not perform services to Caltech.

### Caltech Volunteer Definition

Caltech volunteers are individuals who donate their services to Caltech, freely and without pressure or coercion, for civic, charitable or humanitarian purposes without the promise, expectation or receipt of compensation. A Volunteer can be paid only for reimbursement of reasonable expenses related to their volunteer activities. To qualify as a Volunteer, the individual must be willing to provide services according to these guidelines.

If you are unsure whether an individual's activities would qualify as a Volunteer, contact Human Resources at HRinfo@caltech.edu for assistance.

### Responsibilities and Rights of the Institute Volunteer

A Caltech Volunteer is expected to abide by Institute policies and regulations that govern their actions, including but not limited to those of prohibited against discrimination and harassment, ethical behavior, confidentiality, financial responsibility safety, and substance use.

Caltech volunteers are covered under Caltech's Workers Compensation policy. All volunteers should register with their department in order to be covered. Volunteers may be granted access to resources on campus (e.g., email, computer systems, on-campus parking, library, buildings or labs) depending on the needs and/or requirements of their assigned activities.

### Who May Volunteer

Anyone, including current or retired employees, students, alumni or others may provide volunteer services to the Institute. An employee may not become a Caltech Volunteer at the Institute in the same capacity in which they are employed, or which is essentially similar to the individual's regular work at the Institute. Volunteers should not displace a regular employee or conduct duties that a paid employee would otherwise perform.

Employees, students, guests, external affiliates and visitors may volunteer for specific Caltech activities and programs without being processed as a volunteer but will need to sign a volunteer agreement and release available below.

Undergraduate and graduate students from other institutions who wish to engage in research activities at Caltech are not eligible under the Volunteer or Guest status. Visiting undergraduate and graduate students who wish to perform research at Caltech may apply to one of Caltech's approved programs: the Summer Undergraduate Research Fellowship Program (SURF), the Visiting Undergraduate Research Program (VURP), Visiting Student Researchers (VSR), Special Students.

A foreign person may not volunteer unless they have an appropriate visa status. A visitor for tourism authorization (WT or B-2) does not authorize an individual to engage in the performance of volunteer services at Caltech. Foreign Persons may need Export Compliance review. Please see our Foreign Person Questionnaire chart or contact us at export@caltech.edu for guidance.

# BBE VOLUNTEER APPOINTMENT PROCESS

## **Complete the Volunteer Data Sheet.**

Determine if an Oracle record and therefore other forms are required.

If no agreement is required, maintain the Volunteer Data Sheet in your Division/Department (for your information and for Workers Compensation).

If an Oracle record is needed and therefore other documents are required, have the prospective Volunteer and the Division/Department complete all of the remaining forms.

Individuals under 18 years of age may only volunteer for services appropriate to their age and skill level.

Forward completed forms to Human Resources at HRinfo@caltech.edu for entry into Oracle.

**Volunteer is checked in by the Division.**

## **Payments to Caltech Volunteers**

Payment for services by volunteers is not allowed. However, the Institute may reimburse Caltech volunteers for actual and reasonable expenses incurred in connection with their volunteer activities, following standard Caltech reimbursement guidelines.

## **Volunteer Documents:**

Please submit completed documents to Human Resources at HRinfo@caltech.edu.

If the volunteer service being performed requires forms to be completed, complete the appropriate forms from the following list and send them to Human Resources at HRInfo@caltech.edu.

**Volunteer Data Sheet** --- The data sheet includes required personal information and a section describing the volunteer's proposed activities (which organization, when, what kind of activities, etc). If the volunteer has not been at Caltech before, the information in this form will be used to set up a new Oracle record and a UID will be generated. If the volunteer has an Oracle record, the information will be used to update the original record. If no Oracle record is required, maintain the original in the Division/Department.

**Volunteer Agreement and Release** is signed by the volunteer. It must have a specific start and end date, no longer than one year, renewable by the volunteer's sponsor.

Please complete this document for individuals who do not require oracle access or will be volunteering for a short period of time.

**Confidentiality and Non-Disclosure Agreement** for Volunteers should be signed by the volunteer.

## **Patent Agreement**

Division/Departments may contact the Card Office at cardoffice@caltech.edu if Volunteer requires a Caltech ID. Please note that volunteers who are active employees, students, guests, external affiliates and visitors, *do not require an additional Volunteer ID card.*

When the volunteer's assignment ends, the Division or Department collects ID card (if applicable) and notifies Human Resources via email (HRInfo@caltech.edu) of the departure. Human Resources will terminate the record in Oracle and access privileges will close.