



PHILADELPHIA
INSURANCE COMPANIES

A Member of the Tokio Marine Group



Volunteer Risk Management Guidebook



PIC Loss Control Services

IMPORTANT NOTICE: The enclosed loss control information is for your consideration in your loss prevention efforts. They are not intended to be complete or definitive in identifying all hazards associated with your business, preventing workplace accidents, or complying with any safety related, or other, laws or regulations. You are encouraged to address the specific hazards of your business and to have your legal counsel review all of your plans and company policies.



A Member of the Tokio Marine Group

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1. Why your Organization needs “Volunteer” Risk Management

Volunteers are often a necessary part of a Non Profit Organization’s operational mission. While in the past, many organizations would allow most volunteers to participate, given the current legal ramifications, a poorly screened and implemented volunteer can present a huge liability to your Organization. This liability can drain your resources and also reflect negatively on the Organization’s good name.

Volunteers may have a highly visible role; they are often the people with whom the clients being served interact most closely. In addition, volunteers who are injured on your premises, even if they caused the injury, will be covered under your general liability policy as they are not employees.

Let’s examine a few examples of Volunteer Liability Claims:

- A. Case one- A volunteer, as part of his or her duties, transports clients or other volunteers in their own personal car. On the way to their destination, they are involved in an auto accident and they are held at fault. The passengers in the car sustain injuries. Your NP organization then discovers that the volunteer was driving with a suspended license and had no insurance!

Is the NP organization liable under their auto policy? Generally the answer will be yes if you have purchased an auto liability insurance policy. Indeed, even if the Volunteer has their own policy, it may exclude “business” activities such as volunteering. In the case above, the NP Organization failed to run Motor Vehicle Record, check the driver’s license and require proof of insurance, thus opening the Organization up to litigation.

- B. Case Two – A volunteer tutors children after school. They are primarily alone with the child, often in a “one on one” setting. A parent sues the NP organization alleging that their child was abused. Upon further investigation it appears that the volunteer has been convicted in another state of an abuse related crime. Is the NP organization liable? Yes, the organization failed to properly screen the volunteer. A background check of the individual would have brought to light the prior conviction. Note that the “Cost of Defense” for this type of suit is generally high.
- C. Case Three – A volunteer offers to do maintenance on the NP Organization building. He is unsupervised and decides to clean out the roof gutters. He falls off of a ladder and breaks his hip. He isn’t covered by private insurance and also sues the organization maintaining that the ladder was not in good condition. Is the NP organization liable? Yes, they would be liable under the General Liability policy because he did not sign a “hold harmless” waiver indemnifying the NP Organization.

2. The Legal Ramifications of Volunteers and Volunteering

This is broad topic and is also dependent on individual State Law so only the basics will be covered in this section. There are several types of “Volunteers” in the law. For the purposes of this handbook, the main types will be discussed;

- A “Pure” Volunteer – This is what we typically think of when discussing a volunteer. Per Wikipedia:

“A **volunteer** is someone who works for free serves in a community or for the benefit of natural environment primarily because they choose to do so. The word comes from Latin, and can be translated as will; as in doing something for ones own free will. Many serve through a non-profit organization – sometimes referred to as formal volunteering, but a significant number also serve less formally, either individually or as part of a group. By definition, a volunteer worker does not get paid or receive compensation for services rendered other than reimbursement for out-of-pocket expenses.”

- Mandatory Volunteer – A person who thru a school requirement or sentencing requirement performs community service in which the primary motivator is external to the individual — when people are mandated to serve an authority.
- Directors and Officers of Nonprofit Corporations – These volunteers own a “higher obligation of duty” to the NP Organization and the people it serves. Directors and Officers agree to be bound by these higher standards when they accept the positions. It is important that Directors and Officers self regulate to avoid not being in compliance with governmental regulations and the risk being held liable for the operations or possible mismanagement of the organization.
- Professionals Acting as Volunteers – Often NP Organizations use the talents of Accountants, Dentists, Doctors and other professionals who donate their expertise. They are also held to a higher standard than the “Pure Volunteer”.

There are a few ways that volunteers and NP Organizations including their Directors and Officers can be held liable for damages;

For breach of duty imposed by common law, aka “tort law”.

1. For breach of duty imposed by statue, which is a crime or offense.
2. For breach of duty imposed by an agreement or contract.

Agreement and Waiver

Volunteers should always sign an agreement and release from liability. This document sets down in writing the organization "rules" and helps defend the Organization from liability in the event that the volunteer is injured, or involved in a traffic accident while performing on behalf of the Organization. Refer to the below example

This form is also available in the forms section.

	Philadelphia Indemnity Insurance Company		Page 1 of 1	
	One Bala Plaza, Suite 100, Bala Cynwyd, PA 19004		8/2004	
Volunteer Agreement and Release from Liability				
<p>In Signing this form, I understand and agree to the following terms and conditions related to volunteering my services to _____ <small>(Please keep a copy of this form within each volunteers file for future reference)</small></p>				
Volunteers Name: _____		<input type="checkbox"/> Male	<input type="checkbox"/> Female	
<p>I recognize that, as a volunteer I represent the above organization to the public. I accept the responsibility for this status and will conduct myself in a professional manner. I will be clean and sober when conducting business as a representative of this organization.</p> <p>I will not participate in and will report any and all instances of any sort of harassment, exploitation, and or intimidation. I will work to maintain an atmosphere of physical and emotional safety for everyone associated with the organization: (employees, volunteers, clients and visitors).</p> <p>I agree to maintain the confidentiality of all volunteers, clients, and donors about whom I have personal and identifying information. Please initial here: _____.</p> <p>I agree to honor the commitment length and frequency of service that I make to the organization. I agree to provide as much advance notice as is possible in the event that I will be absent from my volunteer shift. I agree to update my personal information and emergency information as changes occur. Please initial here: _____.</p> <p>I am aware that as a volunteer I expose myself to potential hazards which include but are not limited to: kitchen accidents, cuts, burns, back injury from lifting, car accidents, property damage or injury to others in car accidents, falls, muggings, etc. Potential hazards have been explained to me. I am voluntarily participating in this service with the knowledge of the potential hazards involved and hereby agree to accept any and all risks of injury. Please initial here: _____.</p> <p>I agree that my assignees, heirs, distributees, guardians and other legal representatives will not make a claim against, or sue for injury or damage resulting from the negligence or other acts, howsoever caused, by any employee, agent, or volunteer contractor of the organization as a result of my participation as a volunteer. I hereby release _____ from all actions, claims, or demands that I, my assignees, heirs, guardians and legal representatives now have or may hereafter have for injury resulting from my participation as a volunteer. Please initial here: _____.</p> <p>If my volunteer service includes driving an automobile, I acknowledge that I have both a valid drivers license and automobile liability insurance policy as required by state law. I agree to maintain my license and insurance in good standing for my entire tenure as a volunteer for the organization. I am knowledgeable of and agree to abide by local and state traffic laws. I agree not to drive while under the influence of alcohol and/or other intoxicating substances. Please initial here: _____.</p> <p>I have carefully read this agreement and fully understand its contents. I am aware that this is a release of liability and I sign it of my own free will.</p>				
_____ Volunteer Signature		Date: __/__/____	_____ Witness Signature	Date: __/__/____
Volunteer's Phone Number: (Home): () -		(Work): () -		
Street		City	State	Zip
<p><small>The information and suggestions presented by Philadelphia Indemnity Insurance Companies in this loss control technical resource form are for your consideration in your loss prevention and risk control efforts. They are not intended to be complete in identifying or reporting on every possible or significant hazard at your premises, preventing possible workplace accidents, or complying with all of the local, state or federal health & safety related laws or regulations. The material enclosed within this loss control reference source is intended and encouraged to be altered or redesigned by you to specifically address your hazards.</small></p>				

3. The Importance of Developing “Volunteer Work Descriptions and Policies”

For your volunteers to be able to assist properly with your organization’s mission, they need to be clear about the scope of what they will be doing. They also need to be trained in both the Organization’s policies and specifically in their duties.

For legal and accountability reasons, it is important for nonprofit agencies to have policies which protect the agency, its staff, clients/patrons, and volunteers.

Policies

When developing your policies the following should be taken into consideration:

General Considerations:

- Are there any foreseeable risks involved with the volunteer program/agency as a whole?
- Can these risks be minimized? How?
- Would a policy bring clarity to a particular issue, such as expectations of volunteers or staff and volunteer roles?
- Are there unwritten assumptions or values that should be expressed in policy, for clarity?
- Is there an action plan and/or timeline, for developing and implementing policies?
- How will volunteer input be used when defining policy?

Confidentiality:

If you have Volunteers sign confidentiality statements, are they clear and understandable? Does your staff review the reasons why confidentiality is important to the Organization?

Training and Safety Precautions

It should be made clear to all Volunteers that there is an expectation that they will work safely and take steps to orient themselves to their environment. They should be trained in the location of the fire extinguishers, fire escapes and exits and the procedure of how to deal with injuries.

Volunteer Job Descriptions:

A job description is prepared for committee chairs, committee members with specific jobs, and other volunteer positions as needed. Ideally, a job description is provided to the prospective volunteer before he/she is asked to make a commitment.

A sample job description form is located in the sample form section.

Volunteer Code of Conduct:

It is important that your organization clearly states what conduct is or isn't appropriate while participating as a volunteer.

A sample code of conduct form is located in the sample form section.

Sample Child Abuse Prevention Policy and Procedures

Child abuse happens to children of all ages from birth through adolescence and does not discriminate between gender, race, geography, or socio-economic or cultural groups.

Our policyholders should have an existing documented child abuse prevention program which include the below items as a minimum:

(Note: If the Organization doesn't have a formalized documented program it should be taking the proper risk management steps towards reducing this exposure. To help achieve the desired result of completely eliminating child abuse, top management should begin the risk management process by effectively planning, organizing, leading and controlling all aspects of the child abuse program. The organization should begin by organizing their child abuse prevention strategies into four categories. These 4 categories include Personnel, Program, Premises, and Participants. Then through implementation of the 5 Steps of the Risk Management Process (Identify, Evaluate, Select, Implement, and Monitor) the exposures associated from all 4 elements will help ensure a safer environment for children.)

Elements of a Child Abuse Prevention Risk Management Program (This applies to both Volunteers and employees)

These steps should include, but not be limited to the following:

1. Meet all statutory requirements and regulations pertaining to preventing and reporting child abuse and neglect. When reporting a child abuse or neglect incident be sure the policyholder understands the following:
 - The definition of “abuse” and “neglect” varies from state to state.
 - Some, but not all states impose mandatory reporting requirements on caretaker professionals.
 - Most states require reporting when there is a “reason to believe” a child has been abused or neglected.
 - Most states require the report be filed within 48 hours of the incident.
 - All states provide some type of immunity for filing a report that means if the perpetrator abuse or neglect allegation can't be proven, he/she has the right to sue the reporter.
2. Develop and implement formal recorded written policies and procedures addressing the issue of child abuse. Include the following as standard practices and procedures:
 - Adopt policies of staff selection (regardless of whether paid or volunteer) that include the following screening elements:
 - Position description
 - Application
 - Orientation overview
 - In-depth interview
 - Personal reference checks
 - MVR check
 - Criminal history record checks (local, state, FBI)//background checks
 - State central child abuse registry check / State sex offender registry check
 - Confirmation of education
 - Written application
 - Psychological tests (if required)
 - Medical tests (if required)
 - Home visit (if warranted)
 - Alcohol/drug testing
 - Adopt clear written policies prohibiting unauthorized conduct.
 - Adopt supervision guidelines.
 - Parents are free to come and go without calling
 - No areas are off limits to parents
 - Bathrooms do not contain areas where children can be isolated (two thirds of all daycare sexual abuse takes place during visits to the bathroom)
 - There is adequate supervision during naps.
 - Safety measures are taken to prohibit the release of your child to anyone without your written authorization.
 - Create confidentiality policies to prevent disclosure of hiring or disciplinary practices.

- Develop specific job descriptions and review each description annually.
 - Notify parents of activities, behavior, and practices that an organization deems to be unacceptable.
 - With respect to staff departures, voluntary or otherwise, establish procedures concerning when and how to notify the parents that an individual is no longer affiliated with the organization.
3. Develop and initiate a child abuse prevention training program for all staff members.
 4. Develop and enforce accountability guidelines for re-employment of accused abusers.

Abuse Prevention Training

Abuse Prevention Systems/ Ministry Safe may be accessed through at <http://abusepreventionsystems.com/phly.html> .

Low cost Abuse Prevention Training is available to for Phly insureds through Abuse Prevention Systems or MinistrySafe (for Religious Organizations):

Click on button to be directed to Abuse Prevention Systems program information:



Abuse Prevention Systems Members enjoy these resources:

- Sexual Abuse Awareness Training
- Policies and Procedures
- Screening Resources
- Systems for Tracking Compliance

This system provides legally vetted forms, information and ease of recordkeeping and excellent training for all employees and volunteers. The cost is only \$75.00 per organization for the first year, and \$5.00 per person for the Abuse Prevention Training.

Background Checks- PHLY insureds may use Intellicorp for low cost (\$9.95) background screenings. <http://www.intellicorp.net/branding/philly/default.aspx>.

Volunteers who may drive on behalf of the Organization

Volunteers who may drive on behalf of your Organization may also create an exposure. For these volunteers, you must verify that they hold a current drivers license and carry adequate insurance as well as proof via the MVR that they are a safe driver. Most insurance professionals would agree for the average driver the best liability limits to have are 100/300/100. This means:

100,000 per person for bodily injury
300,000 per accident for bodily injury
100,000 per accident for property damage

It is always best to keep photocopies of both the valid driver's license and proof on insurance on file. Sometimes, their insurance may exclude "business" activities such as volunteering.

Young Drivers pose special problems due to their age. Most insurance companies have restrictions on age, typically requiring drivers to be at least 25 years of age, especially if they are driving others. When driving alone, 21 years of age is generally acceptable. Under no circumstances should teenagers drive themselves or others at the behest or with the knowledge of your organization. Drivers Safety Training may be obtained on www.phly.com

Driver Selection- Review of MVR records: Review motor vehicle department records at inception and at least annually thereafter. Some states have an automated system where employers can provide driver names and the DMV automatically mails the motor vehicle record if there is any activity. A valid driver's license should be required and verified annually.

A brief driving test including backing, parking, freeway merging and vehicle speed control should be conducted for all potential driving hires. A resource for both MVR and Background checks is available through INTELLICORP on www.phly.com.



Driver Training

Conduct a basic review of the specific vehicles safety features; operational features and specific department vehicle policy. Policy items such as seat belt use for drivers and passengers, cell phone use, emergency situations and basic defensive driving principals should be provided on a regularly scheduled basis.

A free online **Defensive Drivers Safety Training Program** is available for our fleet clients. – Simply register at www.phly.com Drivers should take this program when hired and annually thereafter.

Road Evaluation: Conduct road evaluations on all drivers. The purpose is to review defensive driving techniques learned in the classroom or online taking the PHL Y online defensive driver course.

Why your Organization should perform screening and background checks of Volunteers

Just as would screen and perform background checks on potential employees, it is equally important to screen and background check volunteers, especially those who may work with children, developmentally disabled adults or the elderly. Any volunteer working with the financial resources of the organization should be screened.

Philadelphia Insurance Companies has developed the following table for recommended screening and frequencies for NP's working with vulnerable clients:

Recommended Screening Requirements for Paid, Primary, and Secondary Volunteers and Workers

	PAID	PRIMARY	SECONDARY
Employee / Volunteer Application Form	Yes	Yes	Yes
Employee / Volunteer Release and Consent Waiver Form	Yes	Yes	Yes
Interview	In Depth	In Depth	Brief
References	3	3	2 or more
Employment History	Yes (Last 5 Yrs)	Yes (Last 5 Yrs)	Optional
IntelliCorp Criminal/Court Records Check (Federal and State Levels)	Yes	Yes	Optional
Child Abuse Registry Records	Yes	Yes	Optional
Driving Record *unless no driving duties	Yes*	Yes*	Yes*
Drug Screen Test (Note 1)	Yes*	Yes*	Optional

***WARNING:** Table #1's sample screening requirements are suggestions only. Job descriptions and positions vary from place to place, so it is impossible for the authors to accurately categorize volunteers and workers at your organization. Each user of this product is responsible for developing appropriate screening and safety policies. Please carefully customize this list to reflect the responsibilities and situations of volunteers and workers in your organization. Consult legal counsel before implementation.

(Note 1: Federal DOT regulations make drug screening mandatory for some vehicle operators)

5. Creating your own Volunteer Handbook

While Organizations vary, a volunteer handbook can serve as an important part of orientation and as a convenient reference tool for those in community service and volunteering. Create a volunteer handbook that contains useful and practical information for volunteers.

Volunteer handbooks should include most, if not all, of the following information:

General information

- Office locations
- Volunteer stations
- Current programs
- Contact information
- Welcome message from the program director
- Definition of terms or acronyms
- Introduction that includes both a local and national history
- Sample forms
- Work contracts or assignments
- Timesheets — importance of reporting hours of service
- Travel log or expense voucher
- Volunteer registration form
- Explanation of organizational structure (chart or diagram)
- Listing of advisory council or board members
- Account of financial structure or funding sources
- Enrollment policies and procedures
- Volunteer rights and responsibilities
- Volunteer training
- Pre-service orientation
- Confidentiality
- On the job orientation
- In-service training
- Volunteer station training
- Rewards and benefits to volunteers; include information on
- Stipend (if applicable)
- Transportation
- Meals
- Medical and other leaves
- Holidays
- Insurance: accident and liability

- Recognition: events, newsletter, other
- Volunteer Separation
- Resignation
- Disciplinary action
- Loss of funding
- Termination of benefits
- Information for volunteers with disabilities: inclusion and accessibility

6. Philadelphia Insurance Companies Training Programs and Resources

In order to gain full access to these resources and others, please take a moment to register on our website <http://www.phly.com>.

Obtaining low cost Background Checks and other Screening Tools such as Motor Vehicle Records

As a Philadelphia Insurance Companies client, you may obtain low cost screening through IntelliCorp Records, Inc., an affiliate of the Insurance Services Offices (ISO), is a provider of innovative decision-support products for employment and background checks and offers the best screening tools in the industry. IntelliCorp offers a wide range of innovative pre-employment verification and screening services, including criminal background checks, previous employment and education references, MVRs and more.

As a PIC client, you receive the value-added benefit of reduced pricing ([click here to view our reduced pricing and coverage guide](#)) and access to the largest criminal history database available. IntelliCorp provides customers with industry leading information solutions enabling them to make better decisions. No other provider gets you closer to the comprehensive, timely and accurate data you need. Your organization will avoid costly hiring and recruiting mistakes and limit exposure to risk litigation. You can access IntelliCorp's employment solutions by visiting www.phly.com.

Please make certain you have your Policy Number available. Some of the information available includes:

Workers compensation records	Nationwide criminal records searches	Single-county court searches
Education verification	Criminal Super Search - 50 states of criminal record data	Federal criminal records search in all U.S. district courts
Employment verification	Arrest and booking records	Motor vehicle records - all 50 states
Personnel assessments	Statewide criminal searches	Social Security number verification
Drug testing	Civil court records	Credit reports

Management Resources and Training – in2vate Program

Philadelphia Insurance Companies (PIC) is pleased to provide you with the PIC in2vate® program. The PIC in2vate platform is a flexible, comprehensive loss prevention program specifically designed for PIC insureds and is available to you at no additional cost. The

program combines state of the art web-based delivery of training materials, an online library of resources, sample employment policies and forms, and much more.

The PIC in2vate program has been specifically designed for PIC by THE AGOS GROUP, LLC (AGOS), a leader in the prevention of workplace loss and litigation. It is a dynamic platform that allows you to select the features your employees may access and is available 24 hours a day, seven days a week, via a secure, user-friendly site that requires no downloading of software.

- **Weekly Manager's Training Bulletins**
- **SmartTrain.com® - web-based training courses** enable you to keep your managers and supervisors trained on the most up-to-date and relevant information. Courses provided are:
 - **Abuse Prevention** — This program covers five key areas: (1) What is child sexual abuse, (2) the damage caused by child sexual abuse, (3) the warning signs of child sexual abuse and of abusers, (4) how to appropriately respond to suspected child sexual abuse, and (5) what caring adults can do to prevent child sexual abuse in their workplaces, homes, and communities.
 - **Sexual Harassment** — This module explores a common and devastating problem for organizations—sexual harassment. Topics include the personal and economic impacts of sexual harassment; the legal duties of managers and supervisors; what sexual harassment is and isn't; how to spot and prevent potential sexual harassment, how to defend your organization with effective reporting systems, the importance of investigations, and more.
 - **Discrimination** — This module discusses the prohibitions against discrimination on the basis of race, color, national origin, religion, disability, sex, and age. It explains what discrimination is; how even well-meaning conduct can be interpreted as discriminatory; the personal and economic impacts of discrimination; the legal duties of managers and supervisors; how to spot and prevent potential discrimination; how to defend your organization with effective reporting systems; the importance of investigations, and more.
 - **Smart Hiring** — More now than any other time prior to this century, organizations looking to hire are presented with a wide range of candidates. There are numerous economic, social, and cultural changes that are having, and will continue to have, a profound impact on the hiring process. This module is designed to reinforce the importance of fair, lawful, and consistent hiring practices. Such practices will help organizations mitigate the unnecessary exposures to liability created by incorrect, improper, and inconsistent hiring procedures ... and, in the end, to promote successful new hires.

Additional in2vate resources, which are shown below, can be added to your PIC in2vate with preferred PIC pricing.

- TRAC™ (Teamwork, Respect, Awareness, and Communication) Web-based training for all employees
- SmartTrain.com™ web-based training for Managers and Supervisors
- Family and Medical Leave Act (FMLA)
- Workers' Compensation Fraud & Retaliation
- Wrongful Termination
- Workplace Violence
- Unsafe Acts
- Workplace Theft
- Ethics
- Diversity
- SmartTrain.com™ web-based training for Human Resource Managers and Senior Managers
- Hotlines
- Smarter Adults - Safer Children™ (SASC)

Monthly E-Brochures

As a registered user to the <http://www.phly.com/> website you are eligible to receive our monthly loss control E-Brochures: (see below list of some archived E-Brochures)

Below is a sampling of some Archived E-Brochures:

- Cold Weather Freeze-Up Precautions
- Driver Eligibility Criteria
- IntelliCorp Records, Inc.
- HIPPA
- Sexual Harassment in the Workplace
- Employment Background Checks
- Employee Discipline
- Crisis Management and Emergency Response
- Windstorm and Rainstorm Emergency Checklists
- Disaster Support - Temporary Shelters
- Slips and falls
- Transporting People with Special Needs and Wheelchair Securement
- DuraFile: Your Online Safety Deposit Box
- De-escalation
- Schools - Security Alert!!!
- Employment Practices Liability

WEMED Loss Assistance Hotline for EPLI clients

Philadelphia Insurance Companies (PIC) has partnered with nationally recognized law firm Wilson, Elser, Moskowitz, Edelman and Dicker LLP (WEMED) to offer a Loss Assistance Hotline. This hotline provides our policyholders who have purchased "Employment Practice Liability Insurance" with 2 free hours of legal consultation per inquiry with knowledgeable attorneys on any matter that could potentially result in a claim under your PIC policy. This Loss Assistance Hotline is NOT a loss reporting hotline. Please visit www.phly.com for full details including contact information.

7. SAMPLE FORMS AND POLICIES

Sample Volunteer Interview Form

Date: _____

1. Name _____

Address _____

City _____ State _____ zip _____

Phone (H) _____ (W) _____ (cell) _____

2. Skills and Interests:

3. Educational Background:

4. Current Occupation:

5. Hobbies, Interests, and Skills: Is there a particular type of volunteer work you are interested in? (List here all of the areas in which your Organization utilizes Volunteers)

6. Availability: (circle those that apply)

Weekdays, Evenings, Weekends, I am Flexible or: _____

7. Do you have a geographical preference as to where you do volunteer work?

No Yes List _____

8. Do you have access to an automobile that you can use for volunteer work?

No Yes

9. References: List 3 people/ contact info whom you have known for 5 years or more.

1.

2.

3.

9. Will you agree to a Background Check? Yes No

10. Driving Required? If yes, then Staff must confirm the following:

- 1. MVR review of Driver
- 2. Online Drivers Training completed
- 3. Copy of current license
- 4. Copy of current insurance with the following limits
 - 100,000 per person for bodily injury
 - 300,000 per accident for bodily injury
 - 100,000 per accident for property damage

Sample Volunteer Job Description

1. Name or title of the volunteer job/position_____

2. Brief general description of the position, including purpose and how it relates to the goals and objectives of the organization, primary responsibilities, expected results

3. Qualifications required to perform the job well
(Driving, Skills, knowledge, and/or experience; include physical requirements, if any)

4. Time required, including number of hours per week/ month, Length of commitment, Expected starting date

5. Name of person to whom responsible: _____

6. Support system provided by the organization (if applicable) Budget, Meeting space or other space provided, Orientation/training required and by whom provided (If applicable) staff person assigned to work with the volunteer or group

Sample Volunteer Code of Conduct

We appreciate your following these essential rules of conduct – it will keep you and our clients safe and enhance your volunteering experience.

1. Children, friends and family members may not accompany you on your volunteer shift, but you are encouraged to tell your friends and family about volunteer opportunities.
2. Alcohol and Drug Policy: Use of alcohol and controlled or illegal substances before and during your shift is strictly prohibited. Doing so is grounds for dismissal from the Volunteer Program without warning.
3. Harassment of any kind is not allowed. It is not acceptable to harass others on the basis of sex, age, race, color, national origin, religion, marital status, citizenship, disability, or other personal characteristics. Doing so is grounds for dismissal from the Volunteer Program without warning.
4. Report any questionable activity, and/or medical or security related situation to a staff person or the volunteer coordinators.
5. Please share your positive attitude, neat appearance and team spirit with your team members and the public. Your presence makes our program better!

Your Volunteer Program Manager is: _____

He /She may be reached at : _____

Sample Sexual Harassment Policy

I. Purpose

Sexual harassment, either physical or verbal, is a violation of the law. The intent of this policy is to clarify the company's position in matters relating to compliance, discovery, and remedy.

II. Policy

It is the intent of the company to maintain a workplace free of sexual harassment from any source, supervisors, co-workers, or visitors and to discourage any instance of malicious accusation.

III. Definition

Sexual harassment includes repeated, unwanted verbal or sexual advances, sexually explicit derogatory remarks, or statements made by someone in the workplace that are offensive or objectionable to the recipient or that cause the recipient discomfort or humiliation, or that interfere with job performance and that can be reasonably determined to constitute unlawful behavior as follows:

- Submission to the conduct is either an explicit or implicit term or condition of employment
- Submission to or rejection of the conduct is used as a basis for employment decisions affecting the recipient
- The conduct has the purpose or effect of substantially interfering with work performance, or creating an intimidating, hostile, or offensive work environment.

IV. Responsibility

A. The Employee

- To be certain beyond a reasonable doubt that harassment exists and is clearly directed toward the person objecting. Whenever possible, witnesses or other substantiating information should be provided.
- Advise the offending individual that the conduct in question is offensive, and request that it be discontinued immediately.
- If the offending conduct continues or recurs, an official complaint may be placed through the office of the personnel director, or the chief executive officer.

B. The Company

- The complaint will be reduced to written form by the company officer handling the complaint.
- A conference will generally be scheduled within five working days, with the understanding that the most immediate time practical will be utilized. Employees participating in the conference may choose to be accompanied by a co-worker, if that is felt to be desirable.
- The company officer conducting the conference will make every reasonable effort to determine the facts pertinent to the complaint.

- If the complaint can be resolved to the satisfaction of all parties, the matter will be considered closed pending further complaint or additional information. In cases of recurrent complaint or flagrant unlawful behavior, additional sanctions shall be employed.

- The company will make every reasonable effort to insure that no retaliation occurs.

V. Sanctions

The company will engage all or any combination of the following sanctions to remedy instances of sexual harassment:

- Conference
- Transfer
- Demotion
- Termination



Volunteer Agreement and Release from Liability

In Signing this form, I understand and agree to the following terms and conditions related to volunteering my services to _____
 (Please keep a copy of this form within each volunteers file for future reference)

Volunteers Name: _____	<input type="checkbox"/> Male	<input type="checkbox"/> Female
-------------------------------	--------------------------------------	--

I recognize that, as a volunteer I represent the above organization to the public. I accept the responsibility for this status and will conduct myself in a professional manner. I will be clean and sober when conducting business as a representative of this organization.

I will not participate in and will report any and all instances of any sort of harassment, exploitation, and or intimidation. I will work to maintain an atmosphere of physical and emotional safety for everyone associated with the organization: (employees, volunteers, clients and visitors).

I agree to maintain the confidentiality of all volunteers, clients, and donors about whom I have personal and identifying information. Please initial here: _____.

I agree to honor the commitment length and frequency of service that I make to the organization. I agree to provide as much advance notice as is possible in the event that I will be absent from my volunteer shift. I agree to update my personal information and emergency information as changes occur. Please initial here: _____.

I am aware that as a volunteer I expose myself to potential hazards which include but are not limited to: kitchen accidents, cuts, burns, back injury from lifting, car accidents, property damage or injury to others in car accidents, falls, muggings, etc. Potential hazards have been explained to me. I am voluntarily participating in this service with the knowledge of the potential hazards involved and hereby agree to accept any and all risks of injury. Please initial here: _____.

I agree that my assignees, heirs, distributes, guardians and other legal representatives will not make a claim against, or sue for injury or damage resulting from the negligence or other acts, howsoever caused, by any employee, agent, or volunteer contractor of the organization as a result of my participation as a volunteer. I hereby release _____ from all actions, claims, or demands that I, my assignees, heirs, guardians and legal representatives now have or may hereafter have for injury resulting from my participation as a volunteer. Please initial here: _____.

If my volunteer service includes driving an automobile, I acknowledge that I have both a valid drivers license and automobile liability insurance policy as required by state law. I agree to maintain my license and insurance in good standing for my entire tenure as a volunteer for the organization. I am knowledgeable of and agree to abide by local and state traffic laws. I agree not to drive while under the influence of alcohol and/or other intoxicating substances. Please initial here: _____.

I have carefully read this agreement and fully understand its contents. I am aware that this is a release of liability and I sign it of my own free will.

_____ Volunteer Signature	Date: __/__/__		_____ Witness Signature	Date: __/__/__
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Volunteer's Phone Number: (Home): () -		(Work): () -			
	Street		City	State	Zip

The information and suggestions presented by Philadelphia Indemnity Insurance Companies in this loss control technical resource form are for your consideration in your loss prevention and risk control efforts. They are not intended to be complete in identifying or reporting on every possible or significant hazard at your premises, preventing possible workplace accidents, or complying with all of the local, state or federal health & safety related laws or regulations. The material enclosed within this loss control reference source is intended and encouraged to be altered or redesigned by you to specifically address your hazards.