



Volunteer Program Policies and Procedures

I. Introduction

A. Mission

The mission of Care Prepared, Inc. is to increase the understanding, access, and documentation of healthcare planning for all individuals (regardless of race, gender, age, socioeconomic status, sexual orientation, or disability), especially those with life-limiting conditions before a medical crisis.

B. Volunteer/ Staff Relationships

A “volunteer” is anyone who, without compensation or the expectation of compensation, performs a task at the direction of and on behalf of the organization.

Volunteers are critical to the success of Care Prepared, Inc. and are essential to the organization’s day-to-day operations. Volunteers are partners in implementing the mission and programs of the organization, each with complementary roles to play. The board of directors will provide orientation, training, supervision, and feedback to volunteers.

C. Equal Opportunity Policy

Care Prepared, Inc. maintains a strong policy of equal volunteer opportunity. We recruit, accept, train, promote, and dismiss volunteers based on their ability to complete the tasks associated with the position, regardless of race, gender, age, socioeconomic status, sexual orientation, or disability.

II. Volunteer Rights and Responsibilities

- A. Volunteers are viewed as a valuable resource to this organization, its staff, and its clients. Volunteers shall be extended the right to be given meaningful assignments, the right to be treated fairly, the right to effective supervision, the right to be engaged and fully participate, and the right to recognition for work done. In return, volunteers agree to actively perform their duties to the best of their abilities and to remain loyal to the mission, vision, and values of the organization.



III. Volunteer Program Procedures/ Development

A. Application Form

Prospective volunteers must complete an application form for consideration in the volunteer program.

B. Interviewing/Screening Tools

Before being assigned or appointed to a position, all volunteers will be interviewed to ascertain their suitability for and interest in a position. Individuals submitting applications to serve as volunteers should be treated confidentially and respectfully. This initial meeting may take place in person, by phone, or using other methods of communication. This screening process will offer the organization's board leaders the opportunity to learn more about prospective volunteers and allow prospective volunteers to learn more about the organization. Volunteers will also be allowed to ask any questions they may have about the position. Background and reference checks may also be required for volunteer positions within Care Prepared, Inc.

C. Orientation and Training

All volunteers will receive a general introduction to the nature and purpose of the organization, volunteer policies and procedures, and an overview of the volunteer's work to be completed. Volunteers will receive instructions and/or orientation to provide them with the information and skills necessary to perform their volunteer responsibilities.

All volunteers will have a position description for the work they perform on behalf of Care Prepared, Inc. All training and orientation must be completed before the volunteer is permitted to engage with the public on behalf of Care Prepared, Inc.

D. Supervision

Every volunteer will have a clearly identified supervisor (Volunteer Coordinator) who will be available for consultation, support, and direction. The supervisor will be responsible for the management and guidance of the work of the volunteer.

E. Feedback

The work of volunteers shall be reviewed by program participants and/or board leadership regularly (at least annually). Feedback will include an examination of the volunteer's performance of position responsibilities and a discussion of any suggestions the volunteer may have concerning the position or volunteer program. The discontinuation of volunteer services is subject to change based on volunteer needs.

F. Recognition and Opportunities for Advancement

Volunteer service is vital to Care Prepared, Inc., and the organization endeavors to recognize volunteers, both informally and formally in ways that our volunteers appreciate and value.



G. Volunteer Record Keeping System

A system of records will be maintained for each volunteer with the organization. The record will include a volunteer application, volunteer agreement, background check information (if required), emergency information, immunization record (where applicable), dates of services, position held, duties performed, and evaluation of work.

H. Recording of Volunteer Hours

- a. A volunteer sign-in form will be present at each volunteer program or event, and volunteers should sign in and out each time they work on any project.
- b. Volunteers must be accountable to uphold their commitments to volunteer at established times/places.

IV. Volunteer Conduct

A. Job Description

A position description will be specifically defined for each volunteer or group of volunteers. Each volunteer will receive a copy of their position description during the orientation program. In addition, volunteers will be given a minimum number of hours to serve per quarter, or the training must be repeated.

B. Standard of Conduct

The lasting impression that volunteers make on those they serve and work with reflects directly on all volunteers and board members of Care Prepared, Inc. All words and deeds should help build our volunteer program and its reputation for quality.

C. Absenteeism/Attendance

Volunteers should do their best to be present and on time for each event or activity for which they are scheduled. If a volunteer knows that they will be late or absent, they must contact the person in charge of the event or their supervisor at least 24 hours before they are expected to arrive, or as soon as possible, so that alternate plans can be made.

D. Grievance Procedure

Volunteers and board leaders are expected to act professionally and per their position descriptions. At our nonprofit, professional behavior means volunteers are responsible, respectful, diligent, courteous, and work with competence and maturity. It also means that a volunteer refrains from referencing non-work-related or inappropriate topics. Should a volunteer have a grievance concerning their work environment, they should report it promptly to the Volunteer Coordinator or the President of the Board of Directors. Every effort will be made to achieve speedy and effective resolution, and all complaints will be treated confidentially. Confidentiality may not be guaranteed in some circumstances where legal rights may have been violated.



E. Discontinuation of Volunteer Service

If a volunteer wishes to discontinue their volunteer service for any reason, please contact the Volunteer Coordinator so that appropriate arrangements can be made. Volunteers have the right to terminate their volunteer service for any reason. Care Prepared, Inc. reserves the same right to discontinue volunteer services, subject to change based on volunteer needs.

F. Media Conduct/Social Media Conduct

Volunteers should not represent themselves as spokespersons or representatives of the organization under any circumstances without prior approval. Only the board president or their designee shall serve as spokespersons for the organization. Volunteers should not post on social media on behalf of the organization. Volunteers must not take pictures of clientele being served without the written consent of the client and the organization.

G. Alcohol/Drugs

When participating in Care Prepared, Inc. programs and activities, volunteers are prohibited from purchasing, transferring, using, or possessing illicit drugs, alcohol, smoking, or prescription drugs in any illegal way. Implementing this policy provides a drug, smoke, and alcohol-free workplace to ensure a safe, healthy, and productive environment for all volunteers and individuals Care Prepared, Inc. serves. Exceptions to this policy may include special events, such as a fundraiser or gala, where alcohol is served to attendees and permission is extended by the President of the Board in advance. Drug testing (without advance notice) may occur if the Board of Directors deems it necessary. If caught or suspected of breaking this policy, disciplinary actions up to and including termination will result.

H. Harassment Policy

Volunteering should be an enjoyable experience. Harassment is not only illegal, but it also creates uncomfortable conditions and unpleasant experiences for everyone involved. Any volunteer who feels he or she is the subject of harassment should speak to their supervisor in an attempt to reach a solution.

I. Dress Code and Personal Belongings

When volunteers are working on behalf of Care Prepared, Inc., each individual serves as a representative of our organization. Therefore, appropriate dress for the business setting (business casual) is required. Care Prepared, Inc. issued nametags should be worn whenever engaging in Care Prepared events. Personal phones should be put away upon entering the workspace.

J. Confidentiality

As a volunteer at Care Prepared, you may have access to confidential information (information regarding medical treatment or diagnosis, financial information regarding contractual arrangements or other transactions, and information regarding the homes or income of clients). Volunteers must ensure that the agency's official board-approved



confidentiality policy is followed. Volunteers are required to sign the confidentiality policy receipt form before beginning their volunteer service.

K. Conflict of Interest

It is the policy of Care Prepared, Inc. to avoid potential and actual conflicts of interest in all of our efforts. Care Prepared, Inc. abides by a board-approved conflict of interest policy. Volunteers will receive a copy of this policy at their initial orientation. Certain volunteers with significant independent decision-making authority may be asked to complete and sign a conflict of interest statement at their initial orientation and annually thereafter.

L. Partisanship

While working on behalf of Care Prepared, Inc., volunteers must never present partisan information (supporting or endorsing political parties or candidates for office) following our organization's 501(c)(3) status. Exhibiting partisan behavior when working on behalf of Care Prepared, Inc. is a serious offense and may jeopardize our 501c3 status.

M. Proselytizing

Care Prepared Inc.'s program participants, board leadership, and volunteers hold a variety of political, social, religious, and personal beliefs. Volunteers must be respectful of the views and opinions held by others with whom they come in contact while volunteering with the organization. Unless instructed to do so as part of the organization's mission and program, volunteers must refrain from advocating or proselytizing for specific political, social, and/or religious beliefs in these situations.

N. Change of Position

If you wish to seek a change in your volunteer position, please see the Volunteer Coordinator or your supervisor. Assignment to a new volunteer position may require additional screening, training, and application acceptance.

O. Reimbursement of Expenses

In certain situations, volunteers may be eligible for reimbursement of actual out-of-pocket expenses. Such expenses must be pre-approved by the volunteer's supervisor or the Volunteer Coordinator.

P. Standards for Excellence

Care Prepared, Inc. is committed as a best practice to the Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector from the Standards for Excellence Institute. All volunteers are asked to review a copy of the Standards for Excellence code as part of their orientation to the organization. The document can be found at www.standardsforexcellence.org.

Q. Reporting Misconduct/Whistleblower Protection

Any volunteer affiliated with the organization with information about known or suspected financial improprieties or misuse of the organization's resources, or other ethical problems is encouraged to report their concerns to the organization's individual appointed to receive confidential reports/ombudsman who will then ask the President of the Board of Directors of the Organization to investigate. If the allegations involve the President of the Board, problems should be reported to the agency-appointed ethics director.

The person reporting may choose to do so anonymously via mail or through other means of communication.

All efforts will be made to protect the confidentiality of those who report financial improprieties and choose to do so anonymously. However, in certain situations, legal requirements make it impossible to keep the individual's identity confidential.

Following the Sarbanes-Oxley Act, no retaliatory organizational action will be taken against those who report truthful information, even if the person incorrectly believes that a violation has occurred, about the commission or possible commission of any federal offense to a "law enforcement officer." The phrase "law enforcement officer" is defined by the Sarbanes-Oxley Act as including any "officer or employee of the Federal Government authorized under law to engage in or supervise the prevention, detection, investigation, or prosecution of an offense."

R. Use of Material

I understand that all material produced by and provided to me by Care Prepared, Inc. is the intellectual property of Care Prepared, Inc. and may not be distributed outside of my appointed volunteer engagement.

V. Safety and Liability

A. Safety

Although the organization does its best to provide safe conditions for our volunteers, the organization counts on volunteers to be the best protectors of their own personal safety. Volunteers should always be aware of where they are and what they are doing. Volunteers should pay particular attention to safety instructions and proper equipment use. Volunteers should voice their safety concerns and report any injuries to the person in charge as soon as possible.

B. Legal Liability

Volunteers are concerned about their personal liability arising from their service to the agency. When a volunteer acts as a representative of the agency, acting on the agency's



behalf and with its authority and within the scope of the volunteer's duties, the agency may be held vicariously liable for the actions of the volunteer. However, liability is based upon the personal acts of a person, so the volunteer may also be liable for his or her actions.

C. Waiver

All volunteers are required to sign a waiver and release of liability before serving the agency. By signing the waiver, volunteers agree to assume the risk of any accident or injury to person or property that may be sustained in connection with their participation with Care Prepared, Inc. In addition, volunteers agree to release and discharge Care Prepared, Inc. and any of its directors, officers, partners, affiliates, and successors from any and all liability or responsibility for any such accident or injury.

When volunteers drive their vehicle or some other vehicle not owned, leased, or rented by Care Prepared, Inc., Care Prepared's automobile liability and physical damage insurance does not apply. A volunteer's personal automobile insurance policy is primary in the event of an accident occurring while a volunteer is conducting business on behalf of the agency.

D. Liability Insurance

- a. The Care Prepared, Inc. board of directors is covered by Nonprofit Director's and Officers' Liability insurance.
- b. Volunteers are encouraged to discuss their personal insurance program with their insurance agent to determine what coverages are available for claims arising from their volunteer activities.

E. Certificate of Ability

Any potential volunteer who indicates that they are under the care of a physician for any physical or psychological ailment that might impede their ability to work may be asked to present a certificate from the physician as to their ability to satisfactorily and safely perform their duties. Any volunteer who, after accepting an assignment with the organization, enters a course of treatment that might adversely impact the performance of their volunteer duties should consult with the Volunteer Coordinator.

VI. Inclusive Workplace

Inclusive work environments are made up of individuals of diversity; different races, sexes, ethnicities, gender identities, ages, sexual orientations, and ability levels. Inclusion promotes collaboration, creativity, and the sharing of knowledge among board leaders, volunteers, and interns in a real-world environment.

VII. Statement of Affirmation

The volunteer policy may change from time to time, and the board may ask current volunteers to acknowledge the revised policy before continuing their volunteer duties.



I have read the above and acknowledge my understanding of its contents. I agree to abide by the agreements set forth and acknowledge that any violation of this agreement may result in the termination of my volunteer engagement and association with Care Prepared, Inc.

Printed Name of Volunteer

Signature of Volunteer

Date

Email and Phone of Volunteer