

Volunteer Manual

The following policies and procedures govern the activities of all Equitas Health volunteers. The content of the policies that follow is by no means exhaustive. More specific policies and procedures may exist within each of the programs in which volunteers participate throughout our agency (e.g. Hotline, Outreach Programs, Patient Services, etc.). By signing the Volunteer Acknowledgment at the end of this document, the volunteer agrees to comply with these policies and procedures.

Equitas Health Volunteer Manual are intended to clarify our agency's expectations with respect to the following issues:

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1.01 Abuse

Professional behavior is expected of all volunteers. Certain acts are prohibited as they represent a conflict of interest with our agency and its ability to accomplish its mission. Behaviors constituting abuse of patients, other volunteers, staff members or members of our organization or the community we serve are strictly prohibited.

“Abuse” means the willful inflection of injury, unreasonable confinement, intimidation, or punishment with resulting physical harm or pain or mental anguish, or deprivation by an individual, including a caretaker, of goods or services that are necessary to attain or maintain physical, mental and psychosocial well-being. This presumes that instances of abuse of all individuals, even those in a coma, cause physical harm or pain or mental anguish.

“Verbal abuse” refers to any use of oral, written or gestured language that includes disparaging or derogatory terms or threats directed at patients, other volunteers, staff members of our organization or the community we serve.

“Sexual abuse” includes, but is not limited to, sexual harassment, sexual coercion or sexual assault (see Sexual Conduct and Sexual Harassment Policies below).

“Physical abuse” includes, but is not limited to, hitting, slapping, pinching, kicking, etc. It also includes controlling behavior through corporal punishment.

“Mental abuse” includes, but is not limited to, humiliation, harassment, and threats of punishment or deprivation.

1.02 Alcohol/Drugs/Smoking

(a) Equitas Health Drug-Free Workplace Policy

Equitas Health is a community in which responsibilities and freedoms are governed by policies and codes of behavior, including penalties for violations of these standards as stated in your Volunteer Manual. Equitas Health has a standard of conduct which prohibits the unlawful possession, use, or distribution of illicit drugs and alcohol by volunteers on Equitas Health’s site and/or patient sites or as a part of Equitas Health’s activities. Equitas Health will impose disciplinary sanctions on volunteers ranging from educational and rehabilitation efforts up to and including termination of the volunteer relationship with the agency. . Each situation will be reviewed on a case-by-case basis.

It is the goal of Equitas Health to maintain a drug-free workplace. To that end, and in the spirit of the Drug-Free Workplace Act of 1998, Equitas Health has adopted the following policies:

1. Volunteers who violate this prohibition are subject to corrective or disciplinary action as deemed appropriate, up to and including termination (see Disciplinary Procedures and Rules of Conduct).
2. Volunteers/ interns are expected to be free from the effects of drug and/or alcohol use/abuse while conducting business for or on behalf of Equitas Health.
3. Volunteers who are under the influence of, or who use, possess, purchase, receive, sell, distribute or manufacture illegal or illicit drugs while on the job, or on agency property are in violation with Equitas Health’s Drug-Free Workplace Policy. Volunteers who

violate this policy will be refused the opportunity to volunteer and will be removed from the premises and may be asked to no longer volunteer for the agency.

4. Volunteers who are under the influence of alcohol, or consume, possess, purchase, receive, sell, distribute or manufacture alcohol while on the job or agency property are in violation of Equitas Health's Drug-Free Workplace Policy. Volunteers who violate this policy will be refused the opportunity to volunteer and will be removed from the premises. The only exception to this is when a volunteer has prior approval to serve alcohol and/or transport sealed and un-opened alcohol for events, etc.
5. Alcohol consumption is NOT permitted by a volunteer who is assigned a specific work duty at an agency-sponsored event and/or at any time when the volunteer is wearing clothing or other wear with insignia which identifies the agency. Only at the point that a volunteer has completed their shift or duty and the end of their shift has been confirmed, may that volunteer consume alcohol. The volunteer must remove all agency-identifiers (name badges, t-shirts, etc.) before consuming alcohol. However, while permitting consumption and possession of alcohol in certain circumstances, these exceptions do not permit a volunteer to become under the influence of alcohol. As it applies to these alcohol exceptions, and providing that the volunteer does not perform safety-sensitive functions (including driving a vehicle), "under the influence" is defined as at or above .08% BAC. As it relates to alcohol exceptions, if an individual will be performing safety-sensitive functions, consumption is not to reach or exceed .04% BAC.
6. Under no circumstances can alcohol be consumed by, and/or made available to, a minor (any individual under the age of 21) on duty, on agency premises or at agency-related activities.
7. Volunteers who are in possession of alcohol (not including the pre-approved transportation or storage or serving of alcohol) or illegal drugs will be removed from their duty and may face other discipline, up to and including termination.
8. Equitas Health does not prohibit volunteers from using prescription or over the counter drugs when used as prescribed, provided: (a) the prescription drugs are prescribed to the volunteer for medical reasons by a licensed medical practitioner, with dosage and frequency of use prescribed on the label or documentation, and (b) the volunteer's use of prescription or over-the-counter drugs does not affect the volunteer's job performance or conduct; threaten the safety, productivity, public image or property of Equitas Health or its employees or volunteers; or result in criminal behavior (e.g. DUI, another drug and/or alcohol-related arrest or conviction, etc).

It is the volunteer's responsibility to learn if a prescription or over-the-counter drug he/she is taking may affect his/her job performance or conduct: threaten the safety, productivity, public image or property of Equitas Health or its volunteers; or result in criminal behavior.

No volunteer is to perform any function or duty on behalf of the agency if the drugs being taken under this provision adversely affect his or her ability to perform any such function or duty safely and satisfactorily. In such situations, the volunteer should notify his or her supervisor and/or Volunteer Manager to discuss the situation. At no time will someone ask a volunteer about their medical condition. It will be determined if the volunteer is currently fit-for-duty.

(b) Smoking Policy

Equitas Health is a non-smoking workplace. Smoking, vaping, or any form of tobacco free smoking is not permitted in any part of the building or event space.

1.03 At Will Volunteerism

Volunteers and the contributions they make to help achieve the mission of the Equitas Health and enhance quality of life in our greater community are acknowledged and highly appreciated by our Agency.

Volunteers are secondary only to the mission of Equitas Health. It is a well understood principle that volunteerism for its own sake is not what the organization is about. Equitas Health does not exist to provide opportunities for volunteer involvement, but rather volunteer participation is valued because it helps Equitas Health to accomplish its mission and reach out to provide services in the most cost-effective and compassionate manner possible.

The Equitas Health recognizes the fact that you are here because your volunteering is beneficial to both you and the Agency. Should your circumstances change, we understand that you might choose to leave your position. Likewise, Equitas Health reserves the unlimited right to make management decisions concerning the terms and conditions of volunteering, including whether you will continue to be a volunteer. You are a volunteer at Equitas Health on an “at will” basis.

1. You retain the right to terminate your volunteer status with Equitas Health at any time.
2. Equitas Health retains the right to discharge or release any volunteer at any time.

1.04 Attendance, Tardiness and Absenteeism

Frequent absences or tardiness disrupt the flow of services and work for which volunteers are so vital. Chronic absenteeism or tardiness may result in re-assignment to a volunteer activity that may not require regular attendance or punctuality. If you will be absent for any reason, you must notify your supervisor as soon as possible before your scheduled work time, or as soon thereafter as possible. If you will be absent for more than one shift, please indicate a return date. You may be placed on a leave of absence for extended periods, including vacations, study abroad, summer/spring breaks, etc. (See Leave of Absence, Resignation and Reactivation). In the event of an emergency in which you are unable to call personally, please have a third party contact your supervisor.

If you are having difficulty meeting the attendance expectations of your position, please address this issue with your supervisor. If you cannot meet the attendance expectations as discussed with your supervisor, you may consult with the Volunteer Manager to discuss reassignment to a volunteer position which is better suited to your availability.

Failure on your part to call for three consecutive absences without making prior arrangements with your supervisor will be considered a voluntary resignation.

1.05 Bereavement

Individuals who have experienced a recent death of someone close to them (e.g. partner, child, parent) will generally not be accepted as a Equitas Health volunteer for a period of 3 months or longer after the death. Particular attention is paid to this policy when the volunteer is applying

for a position in our Patient Services Department.

Equitas Health Patient Services volunteers will generally be encouraged to go on leave for a period of 1 to 3 months after any loss or experience of emotional distress before taking on another assignment. The volunteer will communicate with his/her immediate supervisor to determine the appropriate course and duration of time to process, grieve and rest.

1.06 Boundaries

Equitas Health recognizes that adhering to social and professional boundaries is important for staff, volunteers and patients. Crossing boundaries may lead to confusing and difficult situations that make a continued relationship uncomfortable.

Equitas Health will make every effort to competently train volunteers to recognize both ethical and legal boundaries which they cannot cross without repercussion. Boundaries specific to each type of volunteer assignment are outlined in more detail within the specific policy & procedure guidelines for those positions, and in technical trainings designed to develop volunteer competencies to perform those specific tasks (e.g. Speakers Bureau, Hotline, and Patients Services Technical Trainings).

Before accepting an assignment, volunteers should clearly understand what boundaries exist. Supervisors should discuss situations in which boundaries have been crossed and give suggestions to help volunteers identify and work through similar situations.

1.07 Bureau of Motor Vehicles Drivers' Abstracts

In order to ensure the safety of our patients and their belongings, and to maintain public trust, the Equitas Health requires that all volunteer applicants pursuing placement in the Client Services department submit to a statewide Bureau of Motor Vehicles Driver's Abstract check, and also provide proof of insurance coverage that meets the State of Ohio minimum requirements.

1. **Volunteer applicants agree to supply the information necessary to conduct these checks, and therefore must correctly complete and sign the Bureau of Motor Vehicles Driver's Abstract Check Permission Form and Proof of Insurance Forms.**
2. Volunteer Services will then conduct the appropriate BMV checks, and upon receiving results, will follow-up accordingly. Unfavorable results from these screening checks do not automatically disqualify applicants from placement within the agency. Results will be reviewed by Volunteer Manager, Compliance Officer, and Chief Operating Officer on a case-by-case basis.

1.08 Equitas Health Name/Logo, Use of

The Equitas Health's name and logo are copyrighted materials. Use of these materials in publications or other media, whether promotional fliers and posters for an event that may benefit Equitas Health or in educational materials, newsletter, etc., produced on our behalf, is strictly prohibited for any individual or organization without express consent from the Executive Director.

Individuals and/or organizations given permission to utilize the Equitas Health name/logo in the production of approved publications and promotional materials will be provided a copy of our

copyrighted name/logo. Use of the name and logo is restricted to the completion of the approved publications and promotional materials only, and cannot be used for future publications and promotional materials without the express approval of the CEO, COO, or Chief Marketing Officer.

1.09 Complaints/Grievances

(a) Complaints

The working philosophy of Equitas Health is that of a team approach where each member is a respected part of the whole team. Constructive input from each member of the team is valued. Nevertheless, responsibility for decision-making must follow a supervisory chain of command.

Volunteers have the right to:

- (1) Question or disagree with decisions that affect them,
- (2) To be heard,
- (3) To have decisions re-evaluated impartially,
- (4) To have problems resolved using a systematic and constructive approach.

In such a case, the volunteer should first approach his/her concern or complaint with his/her immediate supervisor. All attempts should be made to resolve the concern/complaint in a mutually respecting and acceptable manner at this level.

(b) Grievances

Grievances, or unresolved conflicts between volunteers or between volunteers and staff, will be resolved promptly and fairly following the supervisory chain of command.

At the first sign of difficulty, a volunteer should bring the matter in question to the attention of his/her supervisor, or if the supervisor is part of the difficulty, to the next higher level of supervision. Alternatively, if a supervisor or staff member recognizes a difficulty, he/she should bring this to the attention of the volunteer. The volunteer and the immediate supervisor should initiate action to define and explore the issues involved and discuss these together to determine a resolution.

If such a discussion does not resolve the issue or produce positive results within a mutually agreed upon time, the next higher level of supervisor must be contacted as necessary up the chain of command until reaching the Volunteer Manager.

Whenever disciplinary action for a volunteer would be necessary, a member of Volunteer Services must be involved.

Finally, if a satisfactory resolution of the matter is not obtained through his/her immediate supervisor or the Volunteer Manager, the volunteer may submit to the Equitas Health's Compliance Officer a written statement of the basis for the volunteer's dissatisfaction. The Compliance Officer may then meet with the volunteer to consider the matter in question. The Compliance Officer may also hear from persons other than the volunteer and staff members involved who have knowledge of the matter. The decision of the Compliance Officer on the matter shall be final.

Any volunteer who feels that he/she has been subject to harassment of any type by any other volunteer, staff member or any other agent of the organization should promptly

report the incident to his/her supervisor or to the next level of supervision. The supervisor thus notified must report the matter in writing to the Compliance Officer. The Compliance Officer will ensure that the necessary measure to resolve or correct the situation occurs in an expeditious manner.

Guidelines for Volunteer Grievance Resolution:

1. Primary consideration will be given to the Equitas Health policies of confidentiality, non-discrimination and non-harassment.
2. Grievances or conflicts should, whenever possible, be solved informally with the volunteer’s immediate supervisor. When that is not possible, the process will involve each next level up the supervisory chain of command.
3. Prompt and orderly consideration will be given to any grievance or conflict while maintaining due process as well as respect for and dignity of all involved parties.
4. Criteria to be considered for disciplinary action or termination includes:
 - a. Violation of Equitas Health policies of confidentiality, non-discrimination, non-harassment or any of the other approved, written policies, procedures, or principles of Equitas Health.
 - b. Failure to accept supervision.
 - c. Failure to accomplish an assignment through neglect.
 - d. Activity while representing Equitas Health that discredits the organization and is against its governing policies.

1.10 Confidentiality

Equitas Health (Equitas Health) recognizes that one of the most sensitive aspects of providing healthcare to individuals is the matter of confidentiality. Security of any potentially sensitive information is of the utmost importance for all persons associated with Equitas Health. Our reputation in the community is based on trust. And to maintain that sense of trust, we assure all patients, patients, volunteers, donors, and others required and requested confidentiality.

At Equitas Health, maintaining the confidentiality of all sensitive information regarding Equitas Health patients and patients (collectively, “**Equitas Health Clientele**”) is of the utmost importance. Equitas Health, and its employees, board of trustees, agents, and volunteers are obligated under federal and state law to protect certain Confidential Information. Therefore, the Equitas Health’s Board of Trustees has adopted the following Policy on Confidentiality and Security, which applies to the board of trustees, staff, interns, externs, agents, contractors, and volunteers of Equitas Health, as well as auditors, funders, and accreditors performing any form of oversight (collectively, “**Equitas Health Personnel**”).

For purposes of this policy, “Confidential Information” is defined as *any* medical or personal information maintained by Equitas Health, including past, present, and future physical or mental health and/or substance abuse conditions and/or treatments, demographic information, registration records, family records, test results, alcohol and substance abuse records, conversations, research records, volunteer information, donor information, and financial information in any medium, whether oral, written, or electronic regarding employee or patients. “Confidential Information” does not include information relating to employees’ terms and conditions of employment.

The principle of confidentiality must be maintained in all programs, departments, functions, and activities. Adherence to the confidentiality policy and principles includes the following:

Patient Confidentiality

- Access to patient files, including medical and pharmaceutical records is granted only to the clinical staff, regional Program Managers, Program Director, Chief Operating Officer, and Chief Executive Officer or others approved by the Chief Executive Officer as necessary to conduct the business of the agency. Access to specific patient information is granted to compliance, legal, information/technology, and finance staff with supervision from the Patient Services Director, the Patient Services Department, Chief Operating Officer, or the Chief Executive Officer to conduct the business of the agency.
- Staff, volunteers, and contractors will not discuss any individual's record with unauthorized individuals, whether on or off duty. All staff members, volunteers and contractors are required to sign a confidentiality acknowledgment stating their responsibility and commitment regarding patient information.
- Equitas Health Personnel must abide by Equitas Health's HIPAA Policies & Procedures.
- Equitas Health Personnel may not share Confidential Information about Equitas Health Clientele with anyone other than those persons directly involved with the care of that individual and such other persons deemed by an Officer or a Director of the agency to have a need to know the Confidential Information.
- Equitas Health Personnel must not discuss general information concerning the agency's relationship with Equitas Health Clientele, including services offered or donations provided. For instance, Equitas Health Personnel cannot say such things as, "I can't tell you his name, but . . ." or omit saying something that would identify Equitas Health Personnel to a third party. Omitting the names of the party(ies) involved does not ensure confidentiality.
- No information about individuals or records will be released to state, federal, or other agencies that enable the identification of any person by name, address, social security number, or other coding procedures absent presentation of a valid subpoena, court order, specific legislative or administrative authorization for such disclosure, or to prevent clear and immediate danger to person or persons.
- We may disclose health information to a health oversight agency for audits, investigations, inspections, or licensing purposes. These disclosures may be necessary for certain state and federal agencies to monitor the health care system, government programs, and compliance with civil rights laws.
- We may disclose health information for public health reasons in order to prevent or control disease, injury or disability; or report births, deaths, suspected abuse or neglect, non-accidental physical injuries, reactions to medications, or problems with products.
- Equitas Health can disclose medical status for treatment, payment, and healthcare operations.
- If our staff, volunteers, or contractors are presented with a subpoena or a claim of entitlement to confidential information, the Chief Operating Officer or Chief Executive Officer will consult legal counsel before disclosure is made.

- If records are inspected by an outside agency, the individual(s) who inspect the records must be specifically authorized to do so by the Chief Operating Officer or Chief Executive Officer. The taking of notes, copying records, or removal of records is specifically prohibited in such cases without a valid subpoena, court order, specific legislative or administrative authorization for such disclosure, or to prevent clear and immediate danger to person or persons.
- Equitas Health personnel should never confirm to another person, without prior authorization from the Patient Services Director or program coordinators, that an individual has been in contact with Equitas Health. This includes the fact that an individual is or is not served by our organization.
- Before contacting any patient or patient, Equitas Health Personnel must confirm that Equitas Health has the patient's/patient's permission to call, email, and/or mail the patient/patient. When leaving a telephone message (either on a machine or with another person), Equitas Health Personnel should not identify him/herself as calling from Equitas Health without the patient's permission to do so. Instead, the Equitas Health Personnel should simply leave his or her name and telephone number. Similarly, any material mailed to Equitas Health patients should not have the name "Equitas Health," "Equitas Health" or any variation thereof, or the agency's red ribbon logo, or any variation thereof, on the envelope unless we have the patient's permission to send such materials.
- To ensure patient/patient privacy, Equitas Health Personnel must use a two-step verification when calling patients/patients to ensure the individual answering the phone is in fact the intended recipient. Equitas Health Personnel should confirm the first name of the recipient **and** confirm the birthdate, last four digits of the individual's Social Security Number, **or** some other comparable unique number of the patient/patient.
- Equitas Health staff often discuss Confidential Information on the telephone. As a result, all Equitas Health Personnel and others may have only limited access to work areas where Confidential Information is being discussed, for instance, the Medical Center, the Patient Services Department areas, and/or the Pharmacy work areas. In this way, staff can feel free to conduct the business of the agency without concern for breaching confidence. Equitas Health Personnel providing tours of the facility **must not** include the patient/patient areas as part of a tour for this reason unless given consent by an Officer or Director.
- Unless otherwise approved by a supervisor, patient files and protected health information in paper form should never be taken out of the Equitas Health office where the file is maintained.
- See IT policy regarding confidentiality policy for electronic files.
- All professional/patient records will be disposed of in ways that maintain confidentiality.
- Upon termination of employment with Equitas Health, the employee shall maintain patient and patient confidentiality.
- Equitas Health Personnel shall obtain a signed release before disclosing Confidential Information. Equitas Health Personnel must obtain a Release of Information when appropriate if disclosure of Confidential Information is deemed to contain protected

health information (“PHI”) as defined in Equitas Health’s HIPAA Policies & Procedures. If the disclosure does not involve PHI and not regulated under HIPAA or Equitas Health’s HIPAA Policies & Procedures, Equitas Health Personnel must nonetheless obtain written consent to disclose the information. The following circumstances are some examples of when Equitas Health may *not* require a signed release:

- Emergencies – When an individual’s condition represents an immediate threat to the safety of self or others, Confidential Information may be disclosed which would assist in preventing the danger.
- Reporting abuse – The duty to report abuse, including abuse of children, elderly persons and adults with mental retardation or developmental disabilities, supersedes any requirements to protect Confidentiality Information.
- Reporting a felony – Persons who know that a felony has been or is being committed may report such activity to law enforcement. Exceptions include disclosures made during treatment for drug and alcohol abuse, during counseling for victims of sex crimes, and disclosures subject to “privilege” (determined in court proceedings for certain licensed professionals).
- Duty to warn or to prevent injury to third parties – Persons have a duty to warn others threatened by a patient under the following circumstances:
 - a. there must be a reasonable basis to believe that injury will occur,
 - b. the threatened injury must be serious and directed to another person, not property,
 - c. the victim must be identified or reasonably identifiable, and
 - d. the victim must be unaware of the threat.

Donor Confidentiality

- Equitas Health Personnel may only grant access to donor records to assigned clerical staff, any Officer or Director and their designee(s) as needed to conduct the business of the agency.
- Questions regarding donor information should only be directed to the Chief Advancement Officer.
- Equitas Health Personnel may share or release donor lists and/or donor information to any other individual or organization, including in newsletters or other public forums, unless the donor asks to remain anonymous or excluded from certain lists or newsletters.
- Donor confidentiality does not extend to grant funders and other organizational bodies who contribute grant money to Equitas Health.

Volunteer Confidentiality

- Equitas Health maintains volunteer records so that interested volunteers may be contacted for various volunteer opportunities that exist within Equitas Health or for Equitas Health activities. Only Equitas Health Personnel who are responsible for contacting volunteers and Equitas Health Personnel who maintain these records may have access to volunteer records.

- Equitas Health Personnel may share volunteer lists unless the volunteer asks to remain anonymous. And if so, Equitas Health will take steps to ensure that the donor is not listed on any print or electronic materials.

1.11 Conflicts of Interest

- No volunteer may use his/her association with Equitas Health solely for personal gain, either remunerative or reputational. Volunteers are incorporated into the Agency in order to help fulfill Equitas Health’s mission.
- No volunteer may use his/her association with Equitas Health as a vehicle through which to further the mission of another organization. Participation in Equitas Health’s efforts is not to be exploited in an effort to further business, political or religious interests that may conflict with Equitas Health’s mission and core values. (e.g. see Non Discrimination Policy).

1.12 Criminal Background Checks

Equitas Health is perceived as a body of trusted public servants. For this reason, it is necessary to ensure that all those who volunteer for Equitas Health in certain capacities, be subject to a Criminal Background Check, Criminal Background Checks that reveal serious offense(s) will not automatically disqualify an applicant; rather, placement will be considered on a case-by-case basis by the Chief Executive Officer, CEO, and Equitas Health’s legal counsel.

1. All Equitas Health volunteers, as part of the volunteer application process, will be expected to complete an Ohio Criminal Background Check form, which will then be submitted by a member of Volunteer Services to FABCO at 4640 Executive Drive, Columbus, Ohio 43220-3697.
2. All information obtained by Equitas Health from **FABCO** will be maintained as confidential in each individual’s volunteer file. Access to volunteer records is granted only to staff who are responsible for supervising volunteers, clerical staff and volunteers who maintain these records, and Equitas Health’s senior management staff.
3. Volunteers will be notified if they are determined “ineligible” for volunteer service in particular areas and may be given the opportunity to volunteer in other agency areas. In an instance where a volunteer has been determined to be “ineligible” based on a case-by-case review, the volunteer will be given an opportunity to meet with the Department Director making the decision prior to a final decision being reached.

1.13 Definition of a Volunteer

An Equitas Health volunteer is an individual who works for our agency without remuneration. Though volunteers are not paid, professional standards of conduct and job performance are expected. For purposes of this policy and organizational operations, a volunteer includes, but isn’t limited to, individuals and groups of individuals who are processed as a volunteer(s) through the volunteer services program at Equitas Health, a Equitas Health Board of Trustee, work-study students, and interns. This also includes individuals and groups of individuals who perform a one-time, intermittent, or permanent volunteer service to Equitas Health

1.14 Education and Training

Equitas Health provides free training to all of its volunteers. We offer a wide variety of training classes, which include the following:

General Volunteer Training (3-4 hours): *This training is the pre-requisite for all Technical (job-specific) trainings such as Hotline, Outreach, Speakers' Bureau and Patient Services.* It provides volunteers with a basic working knowledge of the services we provide at Equitas Health, with a focus on HIV/AIDS education. This class is offered quarterly, and is generally conducted on a weeknight. For more information regarding this training, please contact a member of the Volunteer Services Team.

Hotline Training/Hotline Tech: Hotline volunteers, upon completion of the **General Volunteer Training**, are provided with additional training to prepare them to competently answer a wide-range of inquiries received on the Ohio AIDS/HIV/STD Hotline. Hotline training begins with a one-day training reviewing telephone communication skills and how to deal with the various types of calls received. For more information regarding Hotline training, please contact Equitas Health's Hotline Coordinator.

Speakers Tech (3 hours): Speakers Bureau volunteers, upon completion of the **General Volunteer Training**, receive additional training on public speaking and presentation skills through our Speakers Tech training. For more information on Speakers Tech training, please contact Equitas Health's Speakers Bureau Coordinator.

Additional Training: Equitas Health's Education and Prevention department regularly schedules training updates covering a range of issues, from STD training, to medical updates, to issues in current events surrounding HIV/AIDS. Though these courses are not often required, volunteers are encouraged to attend additional training classes to continue their professional development as volunteers for our agency.

In general, volunteers should obtain education about and seek to understand the nature of social diversity and oppression with respect to race, ethnicity, national origin, color, sex, sexual orientation, age, marital status, political belief, religion and mental or physical disability. The Equitas Health addresses these issues in its introductory volunteer training classes, and encourages volunteers to participate in continuing education throughout their service as Equitas Health volunteers.

Training you receive through our agency as a Equitas Health volunteer is credited toward your total number of volunteer hours with Equitas Health.

1.15 Electronic Communication, Telephone and Technology

All computers, telephones and telephonic media including but not limited to computers, fax, modems, telephones, email and voice mail systems are for the transaction of Equitas Health services, and should be used only for business purposes, or limited, appropriate and approved incidental personal usage during the time of your volunteer services. Please notify your Equitas Health supervisor if you need to receive personal phone calls while on Equitas Health premises while volunteering.

Volunteers shall uphold agency standards of confidentiality when using all forms of techno-

communications. This includes, but is not limited to: refraining from using individuals' surnames or other identifying information in e-mails or voice messages, and if external emails are sent, they should be encrypted.

Equitas Health communicates a wide range of information to its volunteers through all of the aforementioned media. We will remain conscientious of each volunteer's right to determine by which means he/she does or does not want to receive information.

Because of the speed and ease with which Equitas Health can immediately communicate with large groups of people simultaneously via e-mail, each volunteer with access to this medium are encouraged to provide Equitas Health with his/her e-mail address. E-mail recipients will be among the most well-informed of our members. It is not our intent to communicate less frequently with volunteers who are able to receive only mailings and telephone calls, but the nature of these media pose major limitations to the expeditious dissemination of information relative to e-mail. We will, however, strive to keep all of our volunteers as well-informed as possible.

1.16 Emergency Contacts

There may be a time when you feel you need to contact an Equitas Health staff person immediately. If the emergency is life threatening, putting yourself or another Equitas Health volunteer, patient or staff member in physical danger, call 911. If the emergency is non-life threatening and happens during Equitas Health business hours (Monday through Friday, 9:00 a.m. to 5:00 p.m.), contact your supervisor. If your supervisor is unavailable, call the Equitas Health front desk (299-2437) and ask the receptionist to assist you in locating someone who can help you. If you have a non-life threatening emergency after business hours or on the weekend, leave a voice mail message for your supervisor. You may also want to contact a crisis line:

CDC National AIDS Hotline:

- o English: (800)342-2437
- o Spanish: (800)344-7432
- o TTY: (800)243-7889

National Hopeline Network (Crisis & Suicide):

- o (800)784-2433

Youth Crisis Hotline:

- o (800)448-4663

1.17 Gifts/Finances

A volunteer may not give or accept gifts or personal favors of more than token or nominal value (not in excess of \$10) from any actual or potential donor, volunteer, or patient. This includes meals and entertainment.

1.18 Health/Safety Policy

One of the most important objects of Equitas Health's policies and procedures is to provide and maintain a safe and healthy workplace for all volunteers, patients and employees, and to protect Equitas Health constituents. To that end, it is our intent to provide a drug-free, healthful, safe and secure work environment, both within the agency and at offsite events/activities.

Working with the public calls for volunteers to be courteous and supportive at all times. However, volunteers are not expected to endure verbal or any other abuse or inappropriate behavior from patients, members of patients' households, volunteers, board members or staff. Volunteers are not expected to continue to work in an environment that they consider unsafe. Volunteers working in a patient care setting are provided with training in universal precautions and infection control guidelines and procedures. Volunteers are encouraged to ask their primary health provider for recommendations regarding vaccinations (e.g. flu, hepatitis, etc.) and TB testing. Equitas Health will provide periodic safety and in-service health trainings for all volunteers.

Complaints regarding violations of personal safety are taken seriously, investigated promptly, and when appropriate, corrective action is taken to seek to remedy the situation. Immediately report any injury, incident or concern, no matter how minor, to your immediate supervisor. If you encounter an individual who is threatening immediate harm to a volunteer, staff member, patient or other Equitas Health constituent, either on Equitas Health premises or in the community, contact an emergency agency (such as 911) immediately, and then notify your Equitas Health supervisor.

1.19 Auto Insurance

Volunteers who transport patients or any materials for Equitas Health must carry insurance meeting or exceeding Ohio's minimum standards for financial responsibility.

In Ohio, it is illegal to drive any motor vehicle without insurance or other financial responsibility (FR) proof. It is also illegal for any motor vehicle owner to allow anyone else to drive the owner's vehicle without FR proof.

Section 4509.101 of the Ohio Revised Code prohibits an individual from operating a motor vehicle in Ohio without maintaining proof of FR continuously throughout the registration period with respect to that vehicle, or, in the case of a driver who is not the owner, with respect to that driver's operation of that vehicle. The law requires financial responsibility in the minimum amount of \$12,500 for bodily injury to or death of one (1) individual in any one (1) accident; \$25,000 for bodily injury to or death of two (2) or more individuals in any one (1) accident; and \$7,500 for injury to the property of others in any one (1) accident.

Volunteers providing transportation services to Equitas Health will be required to submit and annually update documentation of state minimum insurance coverage and a valid driver's license.

1.20 Leave of Absence, Resignation and Reactivation

For various reasons, whether professional, personal or due to the emotionally demanding nature of some of the work at Equitas Health, a volunteer may find it necessary or desirable to take a leave of absence or to resign. These are viable options for volunteers to exercise, and they should feel free to do so without guilt or reservation. Reactivation is always an option after a period of rest if a volunteer wishes to resume his/her volunteer activities.

Leave of Absence

If you are experiencing circumstances that interfere with your work and require one month or more of "hiatus" from Equitas Health, you may opt to take a leave of absence. We asked that you contact your supervisor at least two weeks in advance so we can fill your volunteer position.

with other volunteers. Whenever possible, you should confirm your return to work no less than one week prior to your scheduled return date.

Resignation

If you plan to resign from your position with Equitas Health, please notify your supervisor and the Coordinator of Volunteer Services. You will have the option to participate in an Exit Interview with Volunteer Services, either in person or via completion of an Exit Interview questionnaire.

Reactivation

If you wish to volunteer with the agency, please contact the Coordinator of Volunteer Services to review the current volunteer opportunities. Reactivation may be contingent upon conditions such as availability of work and/or previous performance and fulfillment of responsibilities. Additionally, returning volunteers may be required to review certain training elements as a condition of returning to work.

1.22 Liability

Title 42 § 14503: The Federal Volunteer Protection Act of 1997

In 1997, the U.S. Congress passed the Volunteer Protection Act. The law was designed to at least partially immunize charitable and nonprofit volunteers, including directors, officers and trustees, from liability for acts performed in the course of their volunteer duties and to mitigate several social ills perceived by Congress.

Extent of volunteer liability and covered organizations

Under the statutory provisions, no volunteer of a nonprofit organization or governmental entity can be held liable for harm (which is defined as physical, non-physical, economic and non-economic losses) caused by an act or omission of the volunteer of the organization if:

- 1 the volunteer was acting within the scope of the volunteer's duties for the organization at the time of the act or omission;
- 2 the volunteer was properly licensed, certified, or authorized by the appropriate authorities, if such license, certification, or authorization is required, for the activities performed;
- 3 the harm was not caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, flagrant indifference to the rights or safety of the individual harmed by the volunteer; and
- 4 the harm was not caused by the volunteer operating a motor vehicle, vessel, aircraft, or other vehicle for which the state requires the operator or owner of the vehicle to possess an operator's license or maintain insurance.

The statute states, however, that the limitation on volunteer liability does not apply in the following circumstances:

- 1 when the misconduct constitutes either a crime of violence (as defined in the United States Code) or an act of international terrorism for which the volunteer has been convicted in any court;
- 2 when the misconduct constitutes a hate crime as defined in the United States Code;
- 3 when the misconduct involves a sexual offense under state law for which the volunteer has

been convicted in any court;

- 4 when the misconduct involves a deed for which the volunteer has been found to have violated a federal or state civil rights law; or
- 5 when the volunteer was under the influence of alcohol or any drug at the time of the misconduct.

In addition, the statute does not preclude civil actions brought by the organization against its volunteers and does not affect the potential liability of the organization for acts committed by its volunteers.

A volunteer in the context of the statute is defined as an individual who performs services for a nonprofit organization or a governmental entity and who does not receive compensation in excess of \$500 a year or anything of value in lieu of compensation in excess of \$500 a year. The volunteer may be paid reasonable reimbursement or an allowance for expenses actually incurred without losing status as a volunteer. The statute also makes clear that "volunteers" include directors, officers, and trustees, as well as direct service providers. To qualify for the statute's protection, the "nonprofit organization" must be one which is exempt from taxation under section 501 (c) (3) of the Internal Revenue Code.

Ohio Revised Code Title 23 § 2305.38 coincides with the Federal Volunteer Protection Act of 1997 regarding non-profit volunteer liability.

1.23 Media

To ensure the quality and consistency of agency information disseminated to media sources, the following policy shall be enforced:

ALL MEDIA CONTACTS are to be handled by the CEO, COO, Chief Marketing Officer or his/her designee, regardless of who the media representative is or who they are representing or how innocuous the request.

All press releases or other promotional materials are to be approved by the CEO, COO, Chief Marketing Officer or his/her designee prior to dissemination. Failure to comply with Equitas Health Media Policy may cause the agency to ask you to no longer be a volunteer.

1.24 Non-Discrimination

It is the policy of Equitas Health and its volunteers to provide information and program services to any and all interested parties in need of said services and for those interested in serving in a volunteer capacity, without regard to race, color, religion, creed, national origin, gender, gender-identity and expression, sexual orientation, age, disability, HIV status, genetic information, political affiliation, marital status, union activity, military, veteran and economic status.

1.25 Records

The Volunteer Manager maintains a centralized volunteer records system to help maintain the confidentiality, accuracy and efficiency Equitas Health's volunteer data resources. Different records are maintained for different periods of time, depending on the needs of Equitas Health and the requirements of applicable federal, state, and local laws. All records are kept confidential to the extent permitted by law. Each volunteer is permitted to review his/her own volunteer file. Such a review must be scheduled with the Volunteer Manager.

1.26 References

You may request for a Volunteer Services Team member, your immediate supervisor, or other Equitas Health staff members to provide you with a letter of recommendation. It is our policy that you provide at least two weeks notice when requesting letters of recommendation.

1.27 Sexual Conduct/Intimate Relationships

Equitas Health encourages friendly relations between volunteers, patients, interns and staff. However, it is important to remain aware of appropriate professional boundaries. It is the policy of Equitas Health that no volunteer shall engage in sexual activity with any Equitas Health patient with whom such a volunteer has a direct ongoing organizational relationship. Sexual conduct is defined here as any oral, anal, genital, or body contact which, no matter how subtle, would be understood as sexual by a reasonable objective outsider. Volunteers are also prohibited from engaging in sexual activities with patient's relatives or other individuals with whom patients maintain a close personal relationship when there is a risk of exploitation or potential harm to the patient.

Equitas Health discourages relationships of a romantic or sexual nature between supervisors and those they supervise, or volunteers/interns and those they serve (including, but not limited to, Hotline operators and constituent callers). Therefore, if any relationship develops that makes it difficult for you to remain objective and fulfill your obligations as a volunteer/intern, you should discuss the matter with your supervisor.

If an intimate relationship develops between you and your supervisor, please notify the Volunteer Manager immediately, and you will be reassigned to another volunteer/internship position. All facts regarding such circumstances will be kept confidential.

1.28 Sexual Harassment

It is the policy of Equitas Health to maintain a working environment free from discrimination and to prohibit sexual harassment among its volunteers, patients, and applicants for employment and/or patients services, including discrimination, sexual advances, or harassment that may affect the terms and/or conditions of volunteer status and/or services rendered, of said volunteers, patients, and applicants.

Any volunteer, patient, or applicant who believes that he/she has been subjected to a discriminatory working environment, or sexual advances or harassment, which affects his/her volunteer status and/or services, should promptly report such incidents to the Executive Director. Supervisory and management volunteers who perceive any possible sexual harassment will contact the Executive Director for assistance. All information disclosed will remain strictly confidential, unless authorized by the person providing the information. All complaints and allegations of sexual harassment will be immediately and completely investigated and, where necessary, disciplinary action appropriate to the offense will be taken against the guilty parties.

Responsibilities for insuring compliance with, and continued implementation of, this policy rests with the Executive Director. The Executive Director will assure that all Managers, Supervisors, Volunteers, Board Members, and any other service providers associated with Equitas Health share in this responsibility to maintain a work environment free from sexual harassment.

1.29 Solicitation and Distribution

In order to avoid unnecessary annoyances and interruptions, solicitation by a volunteer patient is

prohibited.

Employee distribution of literature, including handbills, or other printed materials in work areas is prohibited at all times.

1.30 Youth Volunteers

There is no minimum age requirement to volunteer with the Equitas Health. However, guardian/parental permission is required for volunteers under the age of 18. Equitas Health's Consent Form for Minor Volunteers may be obtained from the Volunteer Manager.

Individual programs within our agency may have established age requirements for volunteers. For example, Hotline volunteers must be 18 years of age or older. Additionally, volunteers who are under 21 years of age may not bartend at Equitas Health sponsored events which have been approved to serve alcohol. Outreach to certain bars and clubs may also exclude individuals under 18 or 21 years of age, depending on the door policy of the locale.

1.31 Equitas Health Patients as Volunteers

There is no policy restricting the involvement of Equitas Health Patients as volunteers. However, Equitas Health prioritizes the physical, mental, and emotional well-being of patients over their willingness and desire to volunteers. Patients who wish to serve as a volunteer with Equitas Health must obtain approval from both their Case Manager and a member of the Volunteer Services Team before submitting an application to Volunteer Services.

Special Thanks

The Equitas Health would like to extend its thanks to the following organizations for sharing their volunteer policies with us in the drafting of our first Volunteer Manual. The insights gained from their contributions, and the time saved from not having to “reinvent the wheel”, was invaluable.

These organizations include:

- The Saint Louis Effort for AIDS, Saint Louis, Missouri
- Action AIDS, Philadelphia, Pennsylvania
- AIDS Volunteers of Cincinnati, Cincinnati, Ohio
- Project Inform, San Francisco, California
- Minnesota AIDS Project, Minneapolis, Minnesota
- AIDS Project Los Angeles, Los Angeles, California
- Seattle Shanti, Seattle, Washington
- AIDS Project Worcester, Worcester, Massachusetts
- The American Red Cross, Columbus, Ohio
- AIDS Action, Boston, Massachusetts
- L.A. Shanti, Los Angeles, California
- Cascade AIDS Project (CAP), Portland, Oregon and Vancouver, Washington
- Multifaith Works, Seattle, Washington
- Metro Saint Louis AIDS Interfaith, Saint Louis, Missouri
- COSI, Columbus, Ohio

RECEIPT OF VOLUNTEER MANUAL

I have this day received a copy of the Equitas Health’s Volunteer Manual.

I understand that I am responsible for reading (or upon request, will be assisted with reviewing) Equitas Health’s Volunteer Manual. I understand that I can request the policies and procedures in another format.

I understand that this manual replaces any and all prior manuals, policies and practices of the agency.

I agree to abide by the policies and procedures contained herein.

I understand that the policies and procedures contained in this manual may be added to, deleted or changed by the agency at any time.

I understand that any violation of the manual may result in termination of my volunteer relationship with Equitas Health.

I understand that a copy of this receipt will be kept on file with Equitas Health.

If I have questions regarding the content or interpretation of this manual, I will bring them to the attention of the Volunteer Manager.

Volunteer Name _____

Date _____

Volunteer Signature _____

Equitas Health Volunteer Policies
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