VOLUNTEER HANDBOOK

United Way of Madison County
205 W 11th Street
Anderson, IN  46016
www.unitedwaymadisonco.org
765.643.7493

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UNITED WAY FIGHTS FOR THE HEALTH, EDUCATION, AND FINANCIAL STABILITY OF EVERY PERSON IN EVERY COMMUNITY.

We win by living United. By forging unlikely partnerships. By finding new solutions to old problems. By mobilizing the best resources. And by inspiring individuals to join the fight against their community’s most daunting social crises.
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ABOUT THRIVE Network

United Way of Madison County launched the new THRIVE Network on August 1, 2016 to help local families build better financial futures. The Network provides a unique and powerful opportunity for hardworking, yet financially-struggling individuals and families throughout Madison County to receive personalized coaching and supports to obtain good jobs with good wages, success for their children and financial skills that produce long-lasting financial changes in their lives.

The THRIVE Network is an innovative collaborative of several local nonprofit partners working together to provide holistic and bundled services and one-on-one coaching to help families increase income, build savings and acquire assets. Our THRIVE Network is modeled after Annie E. Casey Foundation's Centers for Working Families and will build upon it's proven success in helping families achieve long-term financial stability. The Center for Working Families model has been adopted at more than 100 locations throughout the country and at least two dozen states.

Our THRIVE Network is not a cookie cutter program that individuals will be placed into. Instead, individuals will develop their own personalized financial and educational goals and then work directly with coaches in at least two of three key areas over time to achieve results. Coaching areas are:

- **Income Supports** - access to public benefits, free tax preparation and other financial resources
- **Employment** - education, workforce development, job and vocational coaching, interviewing, resume building and other employment services
- **Financial** - financial education and coaching, reducing debt, budgeting, credit/debt counseling, home ownership and savings programs

THRIVE's collaborative network and bundled services means families don’t just get help with one issue, but benefit from comprehensive and individualized plans that address the many challenges they face.
ABOUT THIS HANDBOOK

United Way of Madison County welcomes you as a new volunteer for the THRIVE Network. You have something valuable and unique to share—yourself. We greatly appreciate your time and energy to help our fellow community members in our network. This handbook was created to help answer any basic questions or concerns you may have as a volunteer. We always welcome ideas and suggestions about improving our program.

This Volunteer Handbook applies to all THRIVE Network Volunteers. It has been designed to introduce you to THRIVE Networks programs and acquaints you with our terms and conditions, which apply to both volunteers and staff. Please understand that this handbook is meant to serve as a general outline, and there may be additional, more specific policies and procedures, which apply to each volunteer depending on their position.

Please take the time to read the handbook carefully and keep it handy for future reference. The VP of Engagement will be happy to answer any questions you may have.

The THRIVE Network is a collaborative program of United Way of Madison County. United Way’s office is located at 205 W. 11th St. Anderson, IN 46016.

Program Leadership contact information for this program is: Kim Rogers-Hatfield, VP of Engagement, k.hatfield@unitedwaymadisonco.org, 765.608.3067
VOLUNTEER OPPORTUNITIES

We offer many different volunteer programs and volunteer activities depending on how involved you want to be. All of the following are FREE to any THRIVE participant and volunteer:

These opportunities to help our THRIVE clients would not be possible without the help of volunteers like yourself. Time requirement is minimal; very little work is required. All materials and resources are provided to you for each event, along with any needed training.

Allies- An ally walks alongside a THRIVE Network participant while they complete their goals. Encouraging and just being there along the way. We want Allies to be a network of support for THRIVE participants. Training is provided. (Commitment is 6 months to 1 year)

Episodic Volunteers (Commitment is sporadic and will be planned in advance)

- **Program Help - Job Readiness** – Conduct practice interviews with THRIVE clients. Assist in creation and customization of client resumes. Training is provided.
- **Program Help – Financial Literacy** - We need volunteers who feel confident in teaching a group about various financial subjects (budgeting, tax prep, shopping on a dime, etc.). Training is provided.
- **Child Care** – Provide care for children during classes or events (on premises only).
- **Moving/Maintenance**– Help with normal maintenance in the home or help move household items when needed and available.
- **Communications & Development** – Host a party to introduce the THRIVE Network and ways to support it to your friends (Women United specific). Help advertise and invite others to upcoming events and opportunities.
- **Event Planning & Support** – These volunteers depend on the event. Possible roles could include being on the planning team or, during the event, greeting, and directing people to areas, setting up and breaking down, or helping with the overall flow of the event.

BENEFITS OF VOLUNTEERING

- Learn and build new skills
- Earn and/or increase your experience in working with people
- Share your skills for to help your community
- Meet and interact with new people
- Improve your health and well-being
  - According to studies, volunteers are healthier, happier, and live longer
- Be invited to special United Way and/or Women United events
**SCHEDULING**

After you select which volunteer opportunity (or opportunities), and agree to a term of volunteering, we will be counting on you to fulfill the responsibilities of your position through regular attendance, including arriving on time. If you know in advance that you cannot attend an upcoming shift, please contact your VP of Engagement and/or your Site Supervisor. If an issue arises at the last minute which prevents you from fulfilling your shift (without at least 1-business day advance notice), or you cannot avoid being late, please call the office and let us know.

**COMMUNITY**

Volunteers will, in good-faith, commit to a period of time generally ranging from 3 months to 1 year with one time and on-going support available (please see your job description for any specific requirements). If a term is agreed upon, we expect you to fulfill it - barring any personal emergencies or unexpected illnesses. If a specific term is not agreed upon, and your interest and availability changes, we kindly request that you give us advance notice of your change of plans so that we can arrange for your position to be filled.

**STANDARD OF CONDUCT**

All volunteers are expected to exhibit professional conduct based on respect, honesty, teamwork, and a commitment to achieving the mission of United Way and the THRIVE Network. We will strive to keep you informed in the event that we feel your conduct does not meet our policies or rules.

The following conduct is prohibited, and will not be tolerated by United Way. This list of prohibited conduct is illustrative only. Other types of conduct injurious to security, personal safety, employee welfare and United Way operations may also be prohibited. The inclusion of this list does not change the at-will nature of your volunteer relationship:

- Failure to comply with United Way work, safety, health, and/or security policies, rules, and procedures.
- Failure to comply with United Way non-harassment policy.
- Insubordination, including but not limited to failure or refusal to follow the orders or instructions of any supervisor, or the use of abusive or threatening language toward any supervisor.
- Physical fighting or threatening of another volunteer or employee.
- Theft, deliberate or careless damage or destruction of any property of the event site or any property of any volunteer, employee or donor.
- Violation of United Way Drug and Alcohol Policy.
- Carrying firearms or any other dangerous weapons on the premises of the event or any United Way or THRIVE partner related business.
- Engaging in criminal conduct whether or not related to job performance.
- Acting in a discourteous manner to donors, suppliers, employees or other volunteers.
- Using abusive language at any time on premises of United Way or THRIVE partners.
DRUG AND ALCOHOL ABUSE

United Way is concerned with the use of alcohol, illegal drugs or controlled substances as it affects the workplace. Use of these substances, whether on or off the job, can adversely affect an employee’s/ volunteer’s performance, efficiency, safety and health and therefore seriously impair the volunteer’s value to United Way or its THRIVE partners. In addition, the use or possession of these substances onsite constitutes a potential danger to the risks of property loss or damage, or injury to other persons.

Similarly, the misuse of prescription drugs and/or over-the-counter drugs also may affect the volunteer’s job performance and seriously impair the employee’s value to the organization.

The following rules and standards of conduct apply to all employees either on any property we use or while carrying out United Way business:

▪ Driving a personal vehicle while working as a United Way THRIVE Network volunteer while under the influence of alcohol, illegal drugs, or controlled substances.
▪ Distribution, sale or purchase of an illegal or controlled substance while on the job.
▪ Possession or use of an illegal or controlled substance, or being under the influence of alcohol, illegal drugs, or any illegal or controlled substances while on the job.

Violation of the above rules and standards of conduct will not be tolerated and will lead to termination.

Any volunteer who is using prescription or over-the-counter drugs that may impair the employee’s ability to perform the job safely, or may affect the safety or well-being of others, must notify a supervisor of such use immediately before starting or resuming work.

PERSONAL STANDARDS AND DRESS CODE

Volunteers are expected to wear clothing appropriate for the nature of our program and the type of work performed. Clothing should be neat, clean and tasteful; Volunteers are not permitted to wear inappropriate clothing, which is revealing, or contains words, pictures, logos of any drug or alcohol-affiliated or otherwise offensive representation. Avoid clothing that can create a safety hazard. Volunteers are expected to be appropriately groomed and practice good personal hygiene.
KEY STAFF FOR VOLUNTEER CONTACT

We welcome your questions, concerns and constructive feedback about your experience as a volunteer, or any ideas for future development of our THRIVE program! Please refer to the list below to find our suggested go-to staff person to direct your communications:

Vice President of Engagement:
Kim Rogers-Hatfield, k.hatfield@unitedwaymadisonco.org, 765.608.3067

President:
Nancy Vaughan, n.vaughan@unitedwaymadisonco.org, 765.608.3061

THRIVE Coach (to be assigned):
_______________________________________________________________________________________

OPEN DOOR POLICY

Suggestions for improving THRIVE Network are always welcome. At some point during your volunteering experience, you may have a complaint, suggestion or question about your position, your working conditions or the treatment you are receiving. Your good-faith complaints, questions and suggestions also are of concern to the United Way of Madison County staff. You should take concerns first to the VP of Engagement. If you are not comfortable taking your concerns to the VP of Engagement, you may contact the President directly.

This procedure may not result in every problem being resolved to your satisfaction. However, United Way of Madison County values your input and you should feel free to raise issues of concern, in good faith, without the fear of retaliation.

NON-HARRASSMENT POLICY

Any volunteer who believes he or she is being harassed or discriminated against, or any volunteer who becomes aware of harassment or discrimination, should promptly notify his or her assigned THRIVE coach on site. If the volunteer is uncomfortable notifying his or her THRIVE coach, the volunteer should notify the VP of Engagement or President.

Upon notification of a harassment complaint, a confidential and impartial investigation will be promptly commenced. The parties of the complaint will generally be notified of the findings and their options. To the extent possible, United Way will endeavor to keep the reporting volunteer’s concerns confidential, except as necessary to conduct the investigation and take any remedial action, and in accordance with applicable law. All volunteers and staff have a duty to cooperate in the investigation of alleged harassment or discrimination. In addition, failing to cooperate or deliberately providing false information during an investigation shall be grounds for disciplinary action, including termination of employment. Any United Way staff or THRIVE coach who learns of any volunteer’s concern about conduct in violation of this policy, whether in a formal complaint or informally must immediately report the issues raised to the President.
BACKGROUND CHECKS (Background, Sex Offender)

This background check may include such information as criminal convictions, driving records, and/or credit reports. You will be notified in advance and asked to sign a consent form, and then will be subject to fingerprinting and background checks.

In addition to passing a background check, all volunteers over the age of 18 will also need to clear a sex offender check prior to their first volunteer assignment.

HEALTH AND SAFETY

It is essential that all employees and volunteers participate in creating a safe work environment for the sake of all participants, staff and volunteers. If you observe an unsafe condition or a work safety health risk, you should correct the situation (if it is safe to do so), and/or immediately report it to the VP of Engagement. Every effort will be made to quickly correct unsafe or unhealthy conditions, work practices, or procedures. We do have an accidental insurance policy that covers you while serving with us. If you get hurt in your volunteer role, please notify your VP of Engagement right away.

COMMUNICATIONS WITH PRESS

Only designated staff of United Way of Madison County are authorized to communicate with the press or other media or public contact. This policy does not limit the free speech of the volunteer acting as individuals, in their own names, but volunteers must be clear that their views are their own and do not imply any endorsement of those personal views by United Way of Madison County as an organization.
The following Ethics Policy is an excerpt from the United Way of Madison County, Inc. Anderson, Indiana, Governance and Operating Manual, July 2016. All volunteers annually sign a “Code of Ethics and Confidentiality Agreement” as a condition of their service with the UWMC. All addendums are available upon request.

ETHICS

In order to accomplish the organization’s mission, the members of our community are asked to place a high degree of trust in both the ability and the integrity of the United Way of Madison County. Such attributes are hard earned and with them comes the responsibility to serve Madison County with the highest level of professionalism. The Code of Ethics presented herein articulates the standards set forth and monitored by the Board Development & Ethics Committee for all volunteers and employees associated with the United Way of Madison County.

Section 1. Personal and Professional Integrity

A personal commitment to integrity in all circumstances benefits each individual as well as the organization. We therefore will:

● Strive to meet the highest standards of performance, quality, service and achievement in working towards our mission.
● Communicate honestly and openly and avoid misrepresentation.
● Promote a working environment where honesty, open communication and diverse opinions are valued.
● Exhibit respect and fairness toward all those with whom we come into contact.

Section 2. Accountability

UWMC is responsible to its stakeholders, which include donors, funded programs and others who have placed faith in United Way. To uphold this trust we will:

● Promote good stewardship of all United Way of Madison County resources, including grants, designated gifts, and other support that is used to assist with program costs, operating expenses, salaries, and employee benefits.
● Report regularly to the general public in all critical areas of operation, including board and staff leadership, the mission, goals and values of the UWMC, the central governance structure, program activities and achievements, financial statements, and fundraising.
● Maintain accurate financial records and report our financial results in an accurate and timely manner.
● Be honest and faithful fiduciaries and protect the funds entrusted to us.
● Use United Way of Madison County resources exclusively for United Way purposes.
● Observe and comply with all laws and regulations affecting our activities.

Section 3. Fund Raising

Giving is a matter of personal choice and decision; no form of coercion is acceptable. To promote voluntary giving we will:
• Accept only those gifts that are made in a non-coerced manner. UWMC staff will address allegations of coercion immediately.
• Use accurate and truthful solicitation and promotional materials.
• While being mindful of necessary and transparent administrative overhead costs, honor the known intentions of a donor regarding the use of donated funds.
• Adhere to United Way of America’s fund raising reporting guidelines and applicable cost deduction standards.

Section 4. Conflict of Interest

The Board Development & Ethics Committee shall distribute annually a conflict of interest and confidentiality questionnaire to all board members and volunteers and ensure that procedures are in place to process and address ethical complaints. The Chair of the Board Development & Ethics Committee shall serve as the Ethics Officer. To avoid any conflict of interest or the appearance of a conflict of interest, UWMC representatives shall:

• Make full disclosure of all potential and actual conflicts of interest. (Addendum 3)
• Avoid any activity or outside interest which conflicts or appears to conflict with the best interest of the United Way of Madison County, including involvement with a current or potential UWMC vendor, grantee, or competing organization unless disclosed to and deemed to be appropriate by the UWMC Board of Directors or Governance Committee.
• Ensure that outside employment or other activities by UWMC staff members do not adversely affect the performance of their UWMC duties.
• Ensure that travel, entertainment and related expenses are paid or reimbursed on a basis consistent with the approved policies of UWMC.
• Decline any gift, gratuity or favor in the performance of UWMC responsibilities except for promotional items of nominal value.
• Refrain from influencing or attempting to influence the selection of staff, consultants or vendors who are relatives or personal friends.
• Comply with the following: In the event that there comes before the Board of Directors, the Governance Committee, or other committee of the organization a matter for consideration or decision that raises a potential conflict of interest for any member of the Board or committee, the member shall disclose the potential conflict of interest immediately, and shall withdraw from consideration of the matter. The disclosure and withdrawal shall be recorded in the minutes of the meeting.

Section 5. Diversity and Equal Opportunity

United Way of Madison County is an equal opportunity employer and is committed to the principles of nondiscrimination and diversity. UWMC employees and volunteers will:

• Value, champion, and embrace diversity as an integral part of their business.
• Not discriminate against and will respect all co-workers and all other individuals without regard to race, color, creed, religion, national origin, gender, marital status, disability, sexual orientation, or age, or status of public assistance.
• Strive to create an environment conducive to professionalism
Section 6. Confidentiality

Confidentiality is a hallmark of professionalism. United Way of Madison County employees and volunteers:

- Will ensure that all information which is confidential or privileged or which is not publicly available is not disclosed inappropriately.
- Shall respect the privacy rights of all individuals in the performance of their UWMC duties.
- Shall annually sign a “Code of Ethics and Confidentiality Agreement” as a condition of their employment or service with the UWMC.
- Will channel requests from the media, because of the obligation to report accurately and completely all relevant material facts, to the UWMC President or designee or to the chair of the Board of Directors.
- Shall hold in confidence donor lists and other information related to United Way fundraising. Such information will not be used for any purpose external to the organization except upon approval by the Board of Directors.

Section 7. Responsibilities to Volunteers

Volunteers who serve through the Board of Directors or in other capacities are crucial to the success of the United Way of Madison County. In order to assist volunteers to serve effectively and to obtain satisfaction from their service, UWMC staff will:

- Support volunteers so they can perform to the highest level of their contribution and personal satisfaction.
- Treat all volunteers with fairness, equity and respect, providing appropriate mechanisms for their views and interests to be expressed.
- Involve volunteers at appropriate levels and phases of the decision-making process.
- Assist in the development and the understanding of the roles of volunteers and employees, respectively; set clear standards of performance for volunteers, and appropriately recognize their contributions.

Section 8. Responsibilities of Volunteers

Volunteers also represent United Way of Madison County and set examples through their ethical conduct and professionalism. Volunteers will:

- Review the Code of Ethics of United Way of Madison County and ensure that they adhere to the spirit of the Code when making policy or otherwise serving the organization.
- Not knowingly take any action or make any statement intended to influence the conduct of UWMC in such a way as to confer any financial benefit on such volunteers, their immediate family members, or any organization in which they or their family members have a significant interest.

Section 9. Code of Ethics Agreement

Volunteers and staff will review and sign a code of ethics agreement annually (addendum 3).
Section 10. Disclosure

United Way of Madison County employees and volunteers are encouraged to disclose any perceived breaches of the Code of Ethics of which they are aware. Disclosure should be made to the Chair of the Board Development & Ethics Committee. Any reported breaches will be investigated by the Board Development & Ethics Committee and appropriate action will be taken. Confidentiality will be maintained for the individual disclosing the breach to the extent possible. United Way of Madison County will not take any adverse action against employees solely for disclosing perceived breaches of the Code. United Way of Madison County expects all employees and volunteers to be prompt, open, and forthright in reporting perceived breaches of the Code of Ethics.


United Way of Madison County is committed to fair, accurate and transparent accounting of its financial matters and expects all employees, officers, directors and agents to act in accordance with the highest ethical standards in the performance of their responsibilities. It requires full compliance with all applicable laws and regulations, accounting standards, accounting controls and audit practices. United Way relies on all its employees, officers, directors and agents to conduct themselves in accordance with the requirements and spirit of this policy and to report any suspected violations of this policy or other questionable financial, accounting or audit matters without fear of retaliation.

A. Reporting Complaints, Concerns or Questionable Financial Practices
Any person or employee who has complaints or concerns about United Way’s accounting, internal accounting controls or other financial or auditing matters, or who becomes aware of questionable accounting or auditing matters, is strongly encouraged to report such matters to the independent auditing firm that is engaged to perform the organization’s annual audit. Such correspondence need not be signed.

In order to facilitate a complete investigation, the reporting individual should be prepared to provide as many details as possible, including a description of the questionable practice or behavior, the names of any persons involved, the names of possible witnesses, dates, times, places, and any other available details. United Way encourages individuals with complaints or concerns to come forward with information and prohibits retaliation against employees raising concerns. However, if an individual feels more comfortable doing so, reports may be made anonymously in the manner described above. Representatives of the independent auditing firm shall promptly discuss the matter with the United Way Finance and Audit Committee, which has responsibility and authority for the investigation of any concerns or complaints relating to accounting and auditing practices.

B. Investigation and Response

The Finance & Audit Committee will oversee the receipt and handling of allegations of questionable accounting or auditing matters, including directing an appropriate investigation and response.
Based on its investigation, the Finance & Audit Committee will recommend promptly any appropriate corrective action to the United Way Governance Committee in response to the complaint or concern to assure compliance with legal and ethical requirements relating to financial, accounting and audit matters. The Governance Committee has the ultimate responsibility and authority to determine any appropriate action.

C. Confidentiality and Non-retaliation

Reports of questionable accounting or audit practices will be kept confidential to the extent possible consistent with the Finance & Audit Committee’s obligation to investigate unlawful or unethical accounting or audit practices. In order to assure confidentiality, an individual may elect to make a complaint anonymously. United Way will not retaliate or take any form of reprisal against any person who makes a report pursuant to this policy or who participates in an investigation regarding a possible violation of applicable laws, rules or regulations. Any such retaliation or reprisal by a United Way employee is forbidden. Any employee who retaliates against another employee or a witness as described above will be subject to discipline, up to and including discharge. Employees who believe they are subject to retaliation because they have made a report or participated in an investigation should report such suspected retaliation to the independent auditing firm in the same manner as described above for the reporting of questionable practices.

Thank you for choosing to become a United Way of Madison County THRIVE volunteer. We hope your experience with us is rewarding and you continue to help us by encouraging others to join us.

Together, we fight for the health, education, and financial stability of every person in Madison County. Together, we Live United.