Talent Management Program Volunteer Handbook

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INTRODUCTION

The Preeclampsia Foundation (the "Foundation") appreciates those who wish to give of their time and talents for the benefit of the organization and its goals. The purpose of this Talent Management Handbook is to explain daily operations, policies and procedures, and provide overall guidance for any individual wishing to volunteer for the Foundation. Volunteers are expected to carry out their responsibilities to the best of their ability, in accordance with our Code of Conduct policy, while upholding the Foundation's mission and adhering to these policies. Your role as a volunteer is critical to the mission of the Foundation.

> "Paul Revere made his living as a silversmith. But he's remembered for what he did as a volunteer."

OPERATING PRINCIPLES

Staff and volunteers of the Preeclampsia Foundation are guided by the following five main principles. We will always strive to:

- Make decisions according to mission and plans;
- Orientate ourselves toward measurable results in every endeavor;
- Communicate according to a standard of "compassionate honesty";
- Work to acknowledge and understand all points of view;
- Adhere to "gold standard" business principles.

MISSION

The Preeclampsia Foundation's mission is to provide patient support and education, raise public awareness, catalyze research and improve health care practices. We envision a world where preeclampsia no longer threatens the lives of mothers and babies.

WHO'S WHO AT THE PREECLAMPSIA FOUNDATION

The Preeclampsia Foundation is governed by a volunteer Board of Directors and is advised by a volunteer Medical Advisory Board. A few individuals with subject expertise additionally serve on an Advisory Council. The Executive Director ensures advancement of the Foundation's programmatic objectives, development and fundraising goals, and manages all staff and volunteer leaders.

The Foundation has only a few paid staff, relying instead on a considerable body of volunteers to execute many of the programs and services we provide. This enables us to be better stewards of our donors' gifts. For more information on staff, visit http://www.preeclampsia.org/about-us.

Our core Talent Management Team oversees nearly all the volunteer work in fundraising, local support groups and volunteer development, online community forum, annual *Promise Walk for Preeclampsia*, *Saving Grace* benefit gala, and other communication and awareness programs. Time and talent are needed in these and other areas, either on an ongoing or short-term basis.

ENGAGEMENT GUIDELINES

BECOMING A VOLUNTEER

Volunteers will be accepted through a registration application process, which is available online under the Make a Difference/Volunteer Center section of the Foundation's website at http://www.preeclampsia.org/make-a-difference/volunteer, or can be requested via email at volunteers@preeclampsia.org. Once established, a volunteer will receive general volunteer orientation and guidelines specific to their choice of service area. Volunteers are one of the most valuable resources at the Foundation and as such are extended the right to meaningful duties, fair treatment and full participation and in exchange agree to perform their assigned duties to the best of their ability and remain loyal to the mission, goals and procedures of the Foundation.

PLACEMENT AND USE OF SKILLS

Volunteers will be matched to opportunities that recognize their talents, interests and availability for serving. If at any time a volunteer wishes to be reassigned or take on an additional project or role they can discuss their interest with their supervisor.

To help keep the Foundation running smoothly, it is important that volunteers complete their tasks on schedule and to monitor the amount of work to which one commits. If deadlines cannot be met, it is important to communicate that status with a supervisor immediately and/or to seek out another volunteer to help with those responsibilities.

MANAGEMENT OF VOLUNTEERS

Volunteers should work with staff and volunteer leaders to determine how they can most effectively serve. It is the responsibility of the volunteer to ask for assistance if needed and regularly report on progress to their staff and volunteer leader, as well as to maintain a record of their own volunteer hours in our online system. It is the responsibility of the department director to seek and provide answers to questions, provide training, and guide their staff as needed.

As appropriate, volunteers may receive evaluations to review their performance, allowing for both the volunteer and the supervisor to suggest changes, seek suggestions and enhance the relationship between the volunteer, staff and the Foundation. Both supervisor and volunteer should establish an open line of communication to better enhance the functionality of the project and organization.

If for any reason a volunteer is unable or unwilling to carry out their commitment of service, she or he should notify their staff or volunteer leader as soon as possible. For volunteers serving in a principal role, advance notice (one month) of resignation is requested.

If for any reason the Preeclampsia Foundation feels the need to terminate relations with a volunteer for the protection of the organization, it can do so at its sole discretion.

> "Never doubt that a small group of thoughtful committed citizens can change the world; indeed, it's the only thing that ever has."
> ~ Margaret Mead

RECOGNITION & REWARDS

The Foundation seeks to honor and recognize its volunteers from time to time and in various ways. We ask that all volunteers maintain a record of their volunteer service time with us for accurate representation of each member's contribution. If you prefer your service to remain anonymous, please let us know.

Volunteers shall not expect to receive any form of payment, including wages, food, clothing, shelter or other kinds of payment, for volunteer talents and services contributed to the Foundation.

The Foundation encourages volunteers to help create and encourage a culture of mutual appreciation and gratitude for the hard work and contributions of fellow volunteers and encourages all volunteers to take the time to express thanks and appreciation to others when appropriate.

> "I am only one, but still I am one. I cannot do everything, but still I can do something; and because I cannot do everything, I will not refuse to do something that I can do."
> ~ Helen Keller

LIABILITY

The Preeclampsia Foundation is not financially or otherwise liable for injury or casualties that occur to anyone while serving as a volunteer for the Foundation. Accordingly, volunteers agree to waive any claims against, indemnify, and hold harmless the Preeclampsia Foundation, its respective officers, directors, employees, sponsors, representatives and volunteers from any and all liability, including attorney fees, that may accrue on account of, or in any way growing out of, any and all property damage, personal injury, and/or economic loss as a result of or in any way related to or arising out of the volunteer's involvement with the Preeclampsia Foundation.

DISCRIMINATION

It is the policy and commitment of the Preeclampsia Foundation not to discriminate on the basis of race, color, sex, national origin, age, disability, religion, or familial status in admission of its volunteers or its programs and services to its constituencies.

SEXUAL HARASSMENT POLICY

The Preeclampsia Foundation is committed to providing volunteers with an environment that is safe and productive and will not tolerate any form of sexual harassment among its employees and volunteers, and encourages volunteers to bring any incident of sexual harassment to the immediate attention of a department director or proper authority.

CONDUCT GUIDELINES

REPRESENTING THE PREECLAMPSIA FOUNDATION

All actions (i.e. speaking publicly, posting on-line, raising funds, spreading awareness) performed on behalf of the Preeclampsia Foundation must be carried out with a positive and professional customer service approach. It is likewise the responsibility of volunteers to regularly visit the website, read informational emails, and stay current and knowledgeable about Foundation activity and accomplishments.

Volunteers as representatives of the Foundation will dress appropriately for the conditions and performance of their duties. Volunteers that serve in a formal capacity such as a presenter, speaker or other face-to-face representative should wear a Preeclampsia Foundation nametag if available. Volunteers who work as support in an office situation will dress according to the code of that particular office. Individual volunteers will be informed of the dress standard for their duties at the time of assignment.

Professional, respectful and timely communication is expected of anybody representing the Foundation whether in person, by email, phone or other communication form.

EMAIL POLICY

The Foundation's detailed email policy can be read in the organizational Policy & Procedures Handbook by request, but the most basic guidelines are as follows:

Foundation emails (firstname.lastname@preeclampsia.org or walklocation@preeclampsia.org) will be created and maintained for individuals who:

- Have an active staff or volunteer leadership role (email accounts not used for 60 days will be deactivated and possibly deleted);
- Need to send email as a representative of the Foundation;
- Have signed the Foundation's Code of Conduct statement; and
- Have been approved by the Executive Director as having a role that requires an individual email account.

Expectations associated with maintaining a Preeclampsia Foundation email account include:

- Emails received will be responded to in a timely manner, usually within 48 hours. An out-of-office message should be set for emails that will be unmonitored for greater lengths of time;
- Although generally less formal than other written communication, email is a business communication tool and users are obliged to use it in a responsible, effective, polite and lawful manner, recognizing that you and the Foundation can be held liable for unlawful, libelous or defamatory emails;
- Email should not be used for personal matters, but rather for Foundation business only;
- Passwords should not be shared with others;
- Accounts not used for 60 days will be deactivated.

All email accounts maintained on our email systems are property of the Preeclampsia Foundation.

COMMUNICATION & TRANSPARENCY

Volunteers shall recognize their work as being done as part of a larger team and therefore will keep the lines of communication open as appropriate within and among the various departments of the organization.

Communication is important both to obtain information and feedback from volunteers and to share with them new information about the Foundation. Email, teleconferences and webinars will be used, but volunteers should feel free to share where they see opportunities for growth, both for the organization and for themselves as volunteers.

As stated in our operating procedures (see page 3), our policy is one of "compassionate honesty." Our communications with one another shall be respectful, direct, and truthful with intent to resolve problems.

ONLINE or WRITTEN COMMUNICATION

All volunteers agree to communicate in writing with sensitivity, patience, and respect. Volunteers should remain conscious of the possibility for misinterpretation of tone and inference, especially in email. Volunteers agree to use clear and kind language when formulating messages.

DISPUTE RESOLUTION

If a problem should arise among volunteers the parties involved should first communicate directly with one another in a respectful attempt to reach a mutual understanding. If reasonable resolution cannot be reached, then a volunteer can first request mediation from their department director and then if necessary the Executive Director. The Board of Directors maintains an HR committee whose chair can be asked to intervene in personnel or organizational conflicts. The Preeclampsia Foundation website forums are public and may not be used as a medium for airing conflicts, including those boards that are protected from public view.

PATIENT SUPPORT

"If not you, who?
If not now, when?

Volunteers will remain sensitive to the experiences of those who seek the Preeclampsia Foundation. Volunteers agree to become familiar with educational tools and materials that offer accurate information to patients in need and the general public (brochures, support forums, *"If Only I Had Known…"* DVD)

Volunteers are not permitted to offer medical advice of any kind, but can direct those in need to the Foundation's "Ask the Expert" online forum. For more information about the Community Forum Use Guidelines, please visit www.preeclampsia.org/terms-and-conditions.

USE AND COPYRIGHT OF WEBSITE

Volunteers will become familiar with the Preeclampsia Foundation website. Using the Foundation's website for personal business promotion or other advertising is not permitted.

Preeclampsia Foundation reserves all rights and privileges to its logo, graphics, endorsement, and property, which cannot be used without consent of proper Foundation authorities.

CONDUCT

A Code of Conduct agreement, which establishes an expectation of professional and respectful behavior, must be signed by volunteers working in an on-going role with the Foundation. Volunteers represent the Foundation in a highly public capacity and may be working with privileged information.

No volunteer or employee should:

a. Authorize the use of the name, emblem, endorsement, services, or property of the Preeclampsia Foundation for the benefit or advantage of any person or organization, except in conformance with Foundation policy.

b. Accept or seek on behalf of any person, any financial advantage or gain of other than nominal value offered as a result of the volunteer's or employee's affiliation with the Preeclampsia Foundation, or knowingly take any action or make any statement intended to influence the conduct of the Foundation in such a way as to confer any financial benefit on any person, corporation, or entity in which the individual has a significant interest or affiliation. (see Conflict of Interest section for more detail.)

c. Publicly use any Preeclampsia Foundation affiliation in connection with the promotion of positions on any issue not in conformity with the official position of the Foundation.

d. Disclose or use any confidential Foundation information that is available solely as a result of the volunteer's or employee's affiliation with the Foundation to any person not authorized to receive such information or use to the disadvantage of the Foundation any such confidential information, without the express authorization of the Executive Director (see Confidentiality section for more detail.)

e. Operate or act in a manner that creates a conflict with the interests of the Foundation and any organization in which the individual has a personal, business, or financial interest. The individual shall disclose such conflict of interest to the Foundation's Executive Director, or a member of the Board of Directors, as applicable, upon becoming aware of it. Where required, the individual shall absent him or herself during deliberations, and shall refrain from participating in any decisions or voting in connection with the matter. (see Conflict of Interest section for more detail.)

> "Character cannot be developed in ease and quiet. Only through experiences of trial and suffering can the soul be strengthened, vision cleared, ambition inspired and success achieved."
> ~ Helen Keller

f. Volunteers shall not conduct themselves in any manner deemed inappropriate by the rule and guidelines provided by the Foundation which includes, but is not limited to:

(1) Theft or inappropriate removal or possession of the Foundation's property or that of any volunteer, staff, agent or visitor, including failing to cooperate fully in any investigation of improper usage of Foundation property,

(2) Volunteering under the influence of alcohol or illegal drugs, and/or illegal or unauthorized possession, distribution, sale, transfer, or use of alcohol or illegal drugs in the volunteer environment,

(3) Creating a disturbance on Foundation premises, at sponsored activities or in areas which could jeopardize the safety of others, including any violation of any federal, state, or local safety or health law while acting as a volunteer of the Foundation.

Volunteers are likewise asked to certify that the statements made in their volunteer application are true and correct and have been given voluntarily. The Preeclampsia Foundation may verify in whole or in part any information provided on the application. Information provided in the application will be kept confidential and will only be disclosed by the Foundation if under a legal obligation to do so.

CONFLICT OF INTEREST

The Preeclampsia Foundation wants all volunteers to fully recognize the importance of their duty to the Foundation's constituents and supporters and the necessity to act in a manner that merits public trust and confidence. It is therefore necessary for volunteers to refrain from engaging in any transaction in which personal interests conflict, potentially conflict or appear to conflict with those of the Foundation.

An actual or potential conflict of interest occurs when a volunteer is in a position to influence a decision that may result in a personal gain for the volunteer or for a relative of that volunteer as a result of the Foundation's business dealings. For the purposes of this policy, a relative is a person who is related by blood or marriage, or whose relationship with the volunteer is similar to that of persons who are related by blood or marriage. Participation in any activity prohibited by this Policy can result in the termination of volunteer service.

While some conflict of interests are easily identifiable, the Foundation requests that all volunteers be aware of examples of conflict of interest to promote the best working environment for the Foundation. All public statements on behalf of the Preeclampsia Foundation should be made by those dedicated to it in an official capacity by a designated Foundation staff member.

The following list of "conflict of interests" is illustrative only and should not be regarded as all-inclusive:

Accepting Payment or Gifts: No volunteer shall solicit for compensation of any kind (including gifts, cash, discounts, concessions, services or other similar item or benefits) for services rendered as part of his or her volunteer service. This includes payment for speaking engagements or for participation in workshops or similar activities. NOTE: If a person or organization wishes to make a charitable donation, volunteers are encouraged to conduct them to the proper donation channels, or if that is impossible, direct them to the project director so that the donation can be processed correctly. Please see the Fundraising Guidelines in Appendix B for more information.

> "We can do no great things – only small things with great love."
> ~ Mother Teresa

Improper Influence: Any volunteer or relative should not, when acting on his or her own behalf or when acting on behalf of another person, business or organization, attempt to influence the Foundation's position on any issue, matter or transaction nor participate in any discussions pertaining to a related organization.

Confidential Information: As explained in the Code of Conduct, inside, personal or sensitive information should not be used either for the purposes of gaining advantage for one's self, a

relative, or another organization or for any other purpose not specifically approved for use by the Foundation.

Political Activities: Volunteers are encouraged to take an active interest and to participate in the political and governmental process. However, except for those authorized to act on behalf of the Foundation concerning official affairs, volunteers participating do so as individuals and not as official representatives of the Foundation. To avoid any inference of support or sponsorship by the Foundation, a volunteer must never represent that his or her political donation, endorsement or other political activity was made or engaged in with the approval, or on behalf, of the Foundation.

CONFIDENTIALITY

Designated and authorized volunteers may be exposed to confidential information that is defined as inside, personal or sensitive information, and may include contact information, health information, or personal experience stories. The Code of Conduct includes a confidentiality statement barring the sharing or disclosing of this information for any unauthorized purposes, including personal benefit.

EVENT ORGANIZING GUIDELINES

We gratefully welcome those who wish to organize events that raise funds and awareness on behalf of the Preeclampsia Foundation, in accordance with our mission. Please review these guidelines if you are interested in hosting a special event or doing fundraising for the Foundation.

It is our goal to empower, not limit, you in your desire to help this cause. Please use this information as a tool that leads you to a successful and rewarding experience on behalf of the Preeclampsia Foundation. If at any time you have questions or need more guidance, please contact Community Relations Director Laney Poye at laney.poye@preeclampsia.org.

PLANNING YOUR EVENT

Because of the Preeclampsia Foundation's main mission of funding research and raising awareness about Preeclampsia, most volunteers will in some way be a part of the fundraising process. Fundraising activities bring about significant tax, accounting, and liability issues and income must be documented according to state and federal requirements in order to prevent penalty to the Foundation. It is crucial that our volunteers are aware of proper procedures when dealing with fundraising and for this reason we have included a few funding guidelines.

> "I care enough to…"
> ~ [your name here]

To begin planning your fundraiser, check out the resources at www.preeclampsia.org/make-a-difference/fundraising and download and submit our "Local Event Organizer Form" to have your event added to our Event Calendar.

REPRESENTING THE PREECLAMPSIA FOUNDATION

Events and promotions must fit the Foundation's mission and provide a favorable, non-controversial public image.

The Preeclampsia Foundation name or logo can only be used with prior approval. Materials printed with the Preeclampsia Foundation name or logo, including letters, tickets, ads, banners, etc. that promote an event, or request contributions, need to be reviewed by a department director, the Director of Operations or Executive Director.

Every event is an opportunity to increase awareness about this relatively common and life-threatening disorder of pregnancy. Official Foundation brochures, publications, awareness merchandise and the website address can be distributed at your event. These materials can be provided by our home office to organizers according to the expected number of participants. In addition, the award-winning DVD, *If Only We Knew…The Quest to Conquer Preeclampsia*, can be shown to inspire and help spread accurate information to the event attendees.

Federal tax laws disallow third-party events from using the Preeclampsia Foundation sales tax-exemption number or Federal Employer Identification Numbers when purchasing any goods or services from suppliers/vendors.

Bank accounts cannot be opened in the name of the Preeclampsia Foundation for any reason.

EVENT LIABILITY

The volunteer organizer is responsible for filing for any necessary permits or insurance coverage needed to hold the local fundraising event. The Preeclampsia Foundation cannot promise to pay or reimburse fees for such permits or coverage. The Preeclampsia Foundation cannot be held responsible in any way for casualties, thefts or accidents that occur at the event.

The Preeclampsia Foundation is not financially or otherwise liable for the promotion or staging of local events or projects. This includes ticket sales or other administrative aspects. The organizer must seek sponsorship, or have the means to cover up-front costs, such as ticket sales, promotion costs, or supplies.

FINANCES

As a responsible steward of public funds, the Preeclampsia Foundation expects that a reasonable percentage of the gross revenues from fundraising events be directed to the Foundation. The total cost to produce the event should not exceed the amount generated from the event. If event expenses are greater than the total collected, it is the organizer's responsibility to cover the additional expense. You do not have to submit a Final Budget Form (available to download at http://preeclampsia.org/volunteer-resources), but it is advised if you will require any reimbursements.

The public should be informed of any net amounts that will actually be donated to the Preeclampsia Foundation. Potential donors must be informed that only portions of proceeds will be donated whenever less than 100% of the net income will be donated. The organizer is responsible for accounting documentation of revenues and expenses.

A Donation Collection Form will be provided to you (also available to download at http://preeclampsia.org/volunteer-resources): please complete and return it, sent "certified mail", to our administrative office along with the funds. Additionally, should donors to your event require a receipt, please include a physical or electronic email address on this form (see section on "Receipting and Tax-Deductibility of Charitable Donations to 501(c)(3) Organizations" below).

All proceeds must be mailed to the Preeclampsia Foundation no later than 21 days following your event. Expenses must be pre-approved by Foundation staff utilizing the Final Budget Form and submitted with accurate receipts and the Expense Reimbursement Report. Expense reimbursements will be delivered to you by the Foundation no later than 21 days following submission of receipts and expense report. For more information on the Foundation's reimbursement policies, please contact Director of Operations Angela Little at angela.little@preeclampsia.org

The Preeclampsia Foundation should be informed, in advance, of any companies approached for underwriting or contributions for the event, so as to coordinate, where necessary, national and regional corporate partnerships.

No volunteer can take a commission for hosting an event.

SPONSORSHIPS

If you plan to seek sponsorships and/or provide benefits to a business for their sponsorship, please contact the Community Relations Director Laney Poye at laney.poye@preeclampsia.org for more direction.

RECEIPTING AND TAX-DEDUCTIBILITY OF CHARITABLE DONATIONS TO 501(C)(3) ORGANIZATIONS

Receipts must be distributed with accurate information, and income needs to be documented according to state and federal requirements and the nature of the donation in order to prevent penalty to the Preeclampsia Foundation. All donations or event registrations are accepted by checks made payable directly to the Preeclampsia Foundation or directly through the Foundation's website by credit card (Visa, MasterCard, American Express or Discover).

Donation of Services & Products

If goods and/or services are received in return for charitable donations (i.e. auction purchases, tokens of appreciation, giveaways, meals, beverages, etc.) the fair market value of those goods and/or services must be determined by the donor, in writing, and given to the Preeclampsia Foundation office for documentation.

Purchase of Donated Services & Products

The value of goods and/or services purchased through a silent auction, live auction, raffle, etc., will be deducted from the total purchase amount to determine the tax-deductible portion of the donation. (i.e. if event fee is $100, but $50 covers meal cost owed to hosting facility, only $50 remains as the tax deductible donation to the charity).

Receipts for Charitable Donations

The Preeclampsia Foundation's policy is to make every effort to acknowledge all donors with an official receipt outlining the tax-deductible portion of that donation. A credit card transaction receipt is emailed directly for all donations made on-line to the Preeclampsia Foundation. Donations received in the mail by check will have a receipt mailed to the name appearing on the check received and that individual, corporation, foundation, etc. will be the eligible party for tax benefits received as a result of the donation.

Cash donations should be converted to a cashier's check and subsequently donated in a single sum to the Preeclampsia Foundation. If a Donation Collection Form is not sent with contact information of cash donors for receipting purposes, only the individual whose name appear on the check will receive tax benefits for the donation. Donors contributing in this circumstance should be made aware that their gift will *not* be acknowledged as a tax-deductible donation to the Preeclampsia Foundation. If the donor of cash, property or in-kind donations wishes to receive tax documentation, the organizer must provide the detailed information listed below:

- Donor's complete name and address
- Date and amount of the contribution
- Whether the contribution was cash, in-kind services or property (non-cash)
- If applicable, description of the type of property and a good faith estimate of the fair market value
- If applicable, detailed description of any goods and services provided in exchange for the contribution

For more information about the definition of non-cash versus in-kind donations, please see our Volunteer Resources section (http://preeclampsia.org/volunteer-resources).

SUPPORT FROM THE PREECLAMPSIA FOUNDATION STAFF

Preeclampsia Foundation staff members are available to offer general advice on event or project planning along with tips for your specific type of event, implement income documentation procedures, as well to have educational and awareness materials provided for your event where appropriate. If you are seeking sponsors, the Foundation can provide sample sponsorship letters and benefit ladders.

Announcements about your event will be posted to the Foundation's website on our event calendar (www.preeclampsia.org/the-news/events), and possibly included in the monthly newsletter or annual report.