



# Volunteer Handbook and Reference Manual



Dear Volunteer,

Welcome to Tax-Aid! Thank you for joining our team. You are now a member of an exceptional Bay Area organization that has established an outstanding reputation for client service. Your energy and achievements directly impact our community by increasing the financial stability of thousands of families and individuals. Over 1,000 Tax-Aid Volunteers donate their efforts to our cause each year. It is our hope that your volunteer experience will be a rewarding and enjoyable opportunity.

The Volunteer Handbook and Reference Manual provides answers to many of the questions you may have about being a Tax-Aid volunteer. It covers policies and procedures, and our mutual responsibilities. You are responsible for reading and understanding the Volunteer Handbook, and for adhering to the Volunteer Program policies and procedures. If anything is unclear, please discuss the matter with the Program Director, Minnie Sage.

The information included in the Volunteer Handbook and Reference Manual may change. Every effort will be made to keep you informed of any changes.

The personal satisfaction gained from a job well done is one reason many people enjoy volunteering. Career development, community service, and enjoying the company of others are additional benefits of your involvement. Tax-Aid is dedicated to doing its part to assure you have a satisfying volunteer experience.

Thank you for giving your time and talent to help others. We appreciate your interest and commitment and hope that you find volunteering with Tax-Aid a positive and rewarding experience.

Sincerely,

Jill Sturm, Executive Director  
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# Purpose of This Handbook and Reference Manual

As a new (or returning) Tax-Aid volunteer you will encounter new situations and will need to become familiar with new surroundings. Your fellow volunteers and the staff—especially your site manager and the Program Director — want to help you get off to a good start. Feel free to ask them for help concerning anything you do not understand.

One of the first things you should do is carefully read this Handbook and Reference Manual. It is designed to answer many of your questions about our volunteer program and to inform you about Tax-Aid's history, philosophy, practices, and policies.

**Although no handbook can answer every question, we have attempted to cover the major points of volunteering with Tax-Aid.** This handbook will serve as a guide to your service; it is not the final word in all cases. Individual circumstances may call for individual attention. **If you have any questions about your volunteer experience, you are encouraged to discuss them with your Volunteer Supervisor and/or the Program Director.**

Tax-Aid depends on its volunteers: your success is our success. We believe you will enjoy your volunteer work, Tax-Aid clients, and your fellow volunteers.

# A**bout Tax-Aid**

## **Background**

Tax-Aid is a 501(c)(3) nonprofit organization founded in 1988 by a coalition of accountants and lawyers. For the past three decades, with the generous support of its donors, Tax-Aid has supported working families on their path toward economic security and financial self-sufficiency. Tax-Aid was founded out of a desire to increase the Bay Area take-up rate of the Earned Income Tax Credit (EITC) and to promote savings and asset building for low income working families. The EITC helps move families off welfare by rewarding work. Since becoming law, the EITC has helped lift more families out of poverty than any other antipoverty program. Tax-Aid's mission is to provide free income tax preparation to low-income families throughout the Bay Area.

## **Tax-Aid Volunteers**

Tax-Aid has a reliable and skilled network of volunteers who consistently provide thousands of hours of volunteer service to our Bay Area community. Tax-Aid's volunteers come from all types of organizations and professional backgrounds. As a volunteer, your contributions, dedication, and commitment are vital to our growth. Each volunteer opportunity, although different, contributes an important part to the organization as a whole. Tax expertise is always critically needed, but there are also jobs that do not require any technical knowledge. You will find a complete description of all the types of trainings that Tax-Aid offers on our website. Volunteers are asked to attend a few training sessions, depending on their level of experience, and to volunteer for at least three sessions. Most Tax-Aid volunteers donate around eight hours over a few weeks. Tax-Aid volunteers come back again and again—motivated by the gratitude of the families they have helped.

Tax-Aid volunteers also include accountants and law students from many local colleges and universities. Many students fulfill graduation requirements for community service through Tax-Aid. Students enjoy networking with professionals from many Bay Area firms which may lead to a job offer.

# A**about the Volunteer Program**

## **Role of the Volunteer Site Manager and Advisors**

The productive involvement of volunteers requires a planned and organized effort. The function of Tax-Aid's Volunteer Management Team is to provide a central coordinating point for effective volunteer placement and to direct and assist volunteer and employee efforts jointly to provide more productive services. Volunteer Management shall also have responsibility for maintaining liaison with other volunteer programs in the community and assisting in community-wide efforts to recognize and promote volunteering. Volunteer Management shall have primary responsibility for planning for effective volunteer deployment, for assisting staff in identifying productive and creative volunteer roles, for recruiting suitable volunteers, and for tracking and evaluating the contributions of volunteers to the organization.

## **Dual Role of Tax-Aid Volunteers and Employees**

At times, Tax-Aid employees may desire to volunteer for the organization. Exempt employees may volunteer for Tax-Aid. However, because of the overtime requirements of the Fair Labor Standards Act and applicable state law, non-exempt employees may only volunteer for Tax-Aid in certain limited circumstances. Specifically, a non-exempt employee is not permitted to volunteer his or her time to Tax-Aid except when all of the following conditions have been met: (1) The service is entirely voluntary with no promise of advancement or penalty for not volunteering — that is, it is not coerced; (2) The volunteer work is sufficiently distinct from, and in a different capacity than, the work for which the non-exempt employee is paid. For example, a non-exempt employee who teaches any courses as part of his or her usual job functions may not “volunteer” to teach other courses; and (3) The volunteer neither expects to receive pay/wages for the volunteer work. Any employee who wishes to volunteer services for Tax-Aid must speak to his or her supervisor or the Executive Director before performing any volunteer service. Additionally, these employees must also submit a completed volunteer application and volunteer authorization form before performing any volunteer service.

## **Definition**

A Tax-Aid volunteer is any person who freely assists Tax-Aid in the accomplishment of its mission without promise, expectation or receipt of compensation.

## **Key Principles of Volunteerism**

- We can broaden our nation's volunteer force by removing barriers to volunteering.
- Volunteers are not “free.”
- Volunteers contribute more than meets the eye.
- “Volunteer” does not mean “Amateur.”

- Volunteers and the organization they serve must meet each other's expectations.
- Volunteers must never be exploited.
- Volunteers gain skills to make them excellent middle and senior managers.
- When recruiting volunteers, it is more important to place the right person in the right job than to attract volunteers at random.
- Everyone benefits when nonprofit organizations collaborate.

## **Diversity**

Tax-Aid aims to fulfill its mission by providing an inclusive volunteer environment. Tax-Aid is a stronger organization for embracing those who share its commitment. Tax-Aid also understands the importance of reaching out to non-traditional communities that are not aware of Tax-Aid and its mission.

## **Volunteer Rights**

Each volunteer is viewed as an important part of Tax-Aid. The following are rights under the Volunteer Protection Act of 1997:

- Volunteers are to be treated with respect and courtesy.
- Volunteers are to receive proper training for the job to be done.
- Volunteers are not to be harassed or discriminated against because of race, color, religion, citizenship, political activity or affiliation, marital status, age, national origin, ancestry, physical or mental disability, medical condition (as defined under California law), genetic information, veteran status, sexual orientation, sex or gender (which includes harassment and discrimination based on gender identity, gender expression, pregnancy, childbirth, or related medical conditions) or any other characteristics protected under federal, state, or local laws.
- Volunteers will receive information on issues regarding liability and other concerns.
- Volunteers will be treated as co-workers.
- Volunteers will know as much about the organization as possible.
- Volunteers will be evaluated.
- Volunteers will be recognized for their efforts in providing program services.

## **Your Responsibility as a Volunteer**

- Be realistic and candid in accepting your assignment, taking into consideration your interests, skills and availability, as well as the needs of Tax-Aid.
- Learn your volunteer assignment as well as you can by completing all required training, asking questions and staying in touch with your supervisor.
- Contribute to Tax-Aid by being reliable and dependable in doing your job and working with your co-workers.



- Follow all policies and guidelines of Tax-Aid, sign a Code of Conduct, observe confidentiality when needed, and engage in appropriate public behavior at all times.
- Participate in the feedback process by letting us know how you feel about your volunteer experience and by giving constructive suggestions for improvement in any area.
- Develop your skills as a volunteer by participating in training and development opportunities. Learn as much as you can to do the best job possible.

### **What You Can Expect Tax-Aid to Provide for You**

- A suitable assignment based upon your interests, skills and availability, as well as Tax Aid's needs.
- Orientation and training to help you perform your job.
- The opportunity to work as part of a team, to contribute to the welfare of the community and the organization, and to be recognized for your contribution.
- To have your time used well due to the planning, coordination and cooperation of supervisors and staff.
- The support you need to do your job, including necessary equipment, supplies, work space and helpful supervision.
- The opportunity to give feedback about your Tax-Aid volunteer experience and receive prompt attention to any concerns which may arise.
- The chance to grow and develop as a volunteer through participation in other Tax-Aid activities, special training events, meetings and more responsible positions.

# Volunteer Policies

## **Volunteer Application**

Tax-Aid seeks to involve individuals whose skills and experience best match the established opportunities. In order to better understand your interest in Tax-Aid involvement, and to provide Tax-Aid with information about your skills, you may be asked to complete a volunteer application and participate in an interview. Once completed, applications and agreements are kept on file.

## **Volunteer Agreement and Release of Liability**

Volunteers are asked to sign an Agreement and Release of Liability. By registering as a volunteer on the Tax-Aid.org website, volunteers have made this agreement. Because the public perceives the decisions and actions of Tax-Aid volunteers as direct reflections of Tax-Aid itself, the Volunteer Agreement indicates that he/she understands and agrees to the responsibilities, potential hazards, benefits, and other conditions of volunteering with Tax-Aid. For risk management purposes, to protect yourself and Tax-Aid, Tax-Aid does not permit anyone to begin volunteer work until this Agreement is either signed or agreed to as part of registration. More information regarding risk management, liability, and safety issues are included in this Volunteer Handbook. If at anytime you have questions regarding the Volunteer Agreement or Release of Liability, please contact the Program Director.

## **Equal Volunteering Opportunity**

Tax-Aid provides equal volunteering opportunity for everyone regardless of race, color, religion, citizenship, political activity or affiliation, marital status, age, national origin, ancestry, physical or mental disability, medical condition (as defined under California law), genetic information, veteran status, sexual orientation, sex or gender (which includes harassment and discrimination based on gender identity, gender expression, pregnancy, childbirth, or related medical conditions) or any other characteristics protected under federal, state, or local laws. All matters relating to volunteering are based upon ability to perform the job, as well as dependability and reliability once appointed.

## **Youth Volunteer and Service Learning**

Volunteers under the age of 18 must have written consent of a parent or guardian before volunteering. Students volunteering for service-learning credit hours for their school must submit their school name and contact information before volunteering.

## **Volunteer Records, References and Privacy**

Tax-Aid maintains records of each volunteer which are the property of Tax-Aid and are confidential. Records include dates of volunteer service, positions held, duties performed, and awards/recognition received. Volunteer records, including

applications, reference checks and background checks, are confidential. Volunteers are responsible for submitting and updating information contained in their files to the Program Director.

## **Emergency Contact Information**

It is the responsibility of each volunteer to regularly update their personal contact information and emergency contact information. This update can be made by contacting the Program Director. Updates of phone numbers, addresses, email addresses and emergency contacts are needed on a regular basis to ensure that Tax-Aid can maintain communication with its volunteers and notify a volunteer's family in case of an emergency.

## **Dates of Service**

The first day you report to volunteer is your official start date. The last day you report to volunteer is your official ending date.

## **Tracking Volunteer Hours**

Your volunteer hours are an important contribution to Tax-Aid. Each volunteer is required to sign-in noting start and end times in order to maintain an accurate record of your contribution. The statistics of your volunteer service are used for volunteer recognition as well as evaluating our program and determining future needs. Finally, many companies are accepting volunteer work as qualifying experience for employment. Future employers may want to know detailed information on the volunteer job held including start and end dates, approximate number of hours volunteered, and duties. Some employers contribute funds to the organizations where their employees volunteer. Please check with your HR department to see if your employer will match your time with a contribution to Tax-Aid.

## **Absences and Tardiness**

Volunteers are expected to be reliable in the performance of their volunteer duties. Volunteer attendance is expected to be dependable and punctual. Being late may inconvenience those who are counting on your presence. If unforeseen circumstances will make you late, please notify your supervisor or the Program Director in advance. For those times when you are ill and unable to volunteer, call as early in the day as possible. Failure to appear without notifying your staff supervisor may result in your dismissal from the Volunteer Program.

## **Role of Supervisors**

Each volunteer has a clearly identified supervisor who is responsible for direct management of that volunteer. This supervisor may be a volunteer or employee. This supervisor is responsible for the day-to-day management and guidance of the work of the volunteer and shall be available to the volunteer for consultation and assistance. The supervisor has primary responsibility for developing suitable assignments for the volunteer, for involving the volunteer in the communication flow of Tax-Aid and for providing feedback to the volunteer regarding their performance. A volunteer or employee who is assigned supervisory responsibility for volunteer(s) shall have this responsibility delineated in their position/job description.

## Volunteer Position Descriptions

Tax-Aid maintains descriptions for each volunteer position. You will receive a copy of the description for your position when you sign up to volunteer. Should your duties and responsibilities change, your site manager or Program Director will inform you.

## Change of Placement

Volunteers may request a change in placement anytime during their volunteer service. If a volunteer elects to be re-assigned, the volunteer must apply for the volunteer position and receive all appropriate training.

## Training

Most volunteer opportunities require training, and some may also require an orientation. Whatever training is necessary for the desired opportunity, volunteers must complete the requirements before being considered an official Tax-Aid volunteer.

## Conflict of Interest

Tax-Aid is judged, in large part, by the individual and collective performance of its volunteers. Tax-Aid must recognize the importance of a volunteer's duty to Tax-Aid, and to its clients and supporters, to act in a manner that merits public trust and confidence.

Each volunteer must act in all matters in a manner that will safeguard the reputation and integrity of Tax-Aid and will preserve and strengthen public confidence in Tax-Aid activities. Likewise, volunteers must refrain from engaging in any transaction in which personal interests conflict, potentially conflict or appear to conflict with those of Tax-Aid. 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 yourself or for a relative as a result of Tax-Aid'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. Some conflict of interest situations are easily identifiable, whereas others are more subtle. Some of the more common situations pertaining to volunteers rise to the potential of conflict as set out below. This list is illustrative only and should not be regarded as all-inclusive:

- **Accepting Payment or Gifts:** No volunteer shall solicit or accept payment 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. If a volunteer has encountered a person or company that is interested in making a charitable donation to Tax-Aid, please contact the Executive Director.
- **Improper Influence:** Any volunteer, or close 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 Tax-Aid's position on any issue, matter or transaction nor participate in any discussions pertaining to a related organization.
- **Insider Information:** Insider information should not be used either for the purposes of gaining advantage for one's self, a close relative, or another organization or for any other purpose not specifically approved by Tax-Aid.

- **Competing with Tax-Aid:** No volunteer shall prevent or hinder Tax-Aid from lawfully competing with others or divert business or personnel from Tax-Aid.
- **Political Activities:** Volunteers are encouraged to take an active interest and to participate in the political and governmental process. However, except for registered lobbyists and others authorized to act on behalf of Tax-Aid, volunteers participating do so as individuals and not as representatives of Tax-Aid. To avoid any inference of support or sponsorship by Tax-Aid, 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 Tax-Aid. Likewise, volunteers must not engage in political activities during their volunteer service on behalf of Tax-Aid.
- **The Making of Statements:** No volunteer shall use Tax-Aid stationery or any title of Tax-Aid or refer to Tax-Aid or misidentify him or herself as an employee thereof in connection with any matter as to which he or she is not authorized as a representative of Tax-Aid and to express an opinion on its behalf. An example of this would be writing an article for the local newspaper.

## Confidential Information

Volunteers are responsible for maintaining the confidentiality of all proprietary or privileged information to which they are exposed while serving as a volunteer. This applies to any information involving a Tax-Aid employee, volunteer, or business involved with Tax-Aid.

Your volunteer service with Tax-Aid assumes an obligation to maintain confidentiality. As a volunteer, you may be privy to information that is confidential in nature. Such information cannot be shared with your family, friends, or acquaintances.

Volunteers are required to sign a confidentiality agreement and waiver. Compliance with that agreement is a condition of participation in the Program.

If you are questioned by someone outside Tax-Aid and you are concerned about the propriety of giving them certain information, remember that you are not required to answer. Instead, as politely as possible, refer the request to your site manager.

No one is permitted to remove or make copies of any Tax-Aid records, reports or documents without prior approval.

Because of its seriousness, disclosure of confidential information will lead to dismissal.

## Information Security Policy

Introduction. This Information Security Policy states Tax-Aid's information security policy and helps Tax-Aid meet our legal obligations and our clients' expectations. All volunteers are expected to read and comply with this Policy.

Guiding Principles. Tax-Aid follows these guiding principles when developing and implementing information security controls:

- Tax-Aid strives to protect the confidentiality, integrity, and availability of its information assets and those of its clients.
- We will comply with applicable privacy and data protection laws.

- We will grant access to sensitive, proprietary, or other confidential information only to those with a need to know and at the least level of privilege necessary to perform their assigned functions ("least privilege access").
- We will provide security training opportunities to help individuals understand and meet their information security obligations.

Monitoring. Tax-Aid reserves the right to monitor any use of its network and systems to the extent permitted by applicable law. By using Tax-Aid's systems, volunteers agree to such monitoring. Monitoring may include (but is not necessarily limited to) intercepting and reviewing network traffic, emails pertaining to services Tax-Aid provides to its clients, or other messages or data sent or received and inspecting data stored on individual file directories, hard disks, or other printed or electronic media.

Sanctions. Tax-Aid may treat any attempt to bypass or circumvent security controls as a violation of this Policy. Any violation of this Policy may result in disciplinary action or other sanctions. Sanctions may include suspension, access restrictions, work assignment limitations, or more severe penalties up to and including termination, in accordance with applicable law.

Training. Tax-Aid will provide security training opportunities to help volunteers understand their obligations under this Policy and avoid creating undue risks.

Handling Confidential Information. As a volunteer, you will likely come in contact with confidential information of Tax-Aid and its clients ("Confidential Information"). You must properly handle, store, and securely dispose of all Confidential Information. You must protect all client Confidential Information Tax-Aid creates or receives in accordance with this Policy in addition to any specific client-identified requirements. Do not allow others to view, access, or otherwise use Confidential Information you control unless they have a specific business need to know. All client-provided personal information should be treated as "Highly Confidential Information." Tax-Aid strives to limit its collection of client-provided personal information as much as possible. Tax-Aid uses encryption to protect Confidential Information according to risks. Encryption may be applied to stored data (data-at-rest) and transmitted data (data-in-transit). Encrypting personal information may lower Tax-Aid's liability in the event of a data breach.

Information Storage. You must store Confidential Information and files or other data critical to Tax-Aid's operations on regularly maintained (backed up) servers or other storage resources. Do not store business critical data or client data on end-user devices such as desktops, laptops, smartphones, or other mobile devices. Physically secure any media containing Confidential Information, including hard drives, CDs, disks, paper, voice recordings, removable drives (such as thumb drives, flash drives, USB drives), or other media. You must store media containing Confidential Information in a locked area when not in use.

Information Destruction. As soon as Confidential Information is no longer required to meet business needs, you must return all electronic, magnetic, or optical media containing such information to Tax-Aid for secure disposal, or to the appropriate client, as the case may be. You must securely shred all paper containing such Confidential Information. When Tax-Aid retires or otherwise removes computing, network, or office

equipment (such as copiers or fax machines) or other information assets that may contain Confidential Information from the business, specific steps must be taken to scrub or otherwise render the media unreadable.

User Accounts & Passwords. Tax-Aid assigns unique user accounts and passwords to individuals. You must protect all user credentials and not share your account or password with others. At minimum passwords must: be at least 8 characters; comprise a mix of letters (upper and lower case), numbers, and special characters (punctuation marks and symbols); and not comprise an obvious keyboard sequence or common term (i.e., "qwerty," "12345678," or "password"). Reactivation may be based on a timeout or manual reset according to risk and technical feasibility.

Access Restrictions. Tax-Aid restricts access to specific resources to those with a business need to know. System and application administrators must periodically review user accounts and access levels to confirm that a legitimate business need for the access still exists. Proper authorization levels ensure that Tax-Aid only grants individuals the privileges they need to perform their assigned activities and no more. Least privilege access applies to user and administrative access.

You may only access Tax-Aid's network using approved end-user devices that support our current minimum information security standards. Standards for end-user devices may include protective controls and specific configurations, such as anti-virus software, patching levels, and required operating system or other software versions. Tax-Aid-owned machines may be configured to automatically receive upgrades. You may be denied remote access using non-Tax-Aid owned devices that do not meet current standards.

End-user computers may be denied network access if installed software versions do not match current standards. Users may not access Tax-Aid's network unless they have been properly authenticated.

Third Party Access. Tax-Aid grants systems access to approved external parties, such as contractors, vendors, service providers, business partners, or others with a demonstrated business need that cannot be reasonably met through other means. Tax-Aid may support different access levels for different situations.

Remote Access. If you have a business need to access Tax-Aid's network and systems from home, while traveling, or at another location, Tax-Aid may grant you remote access. Use two-factor authentication to access Tax-Aid's network remotely. Configure remote access capabilities to limit access to only those assets and functions Tax-Aid approves. You may only use Tax-Aid-provided means for remote access (for example, VPN connections, dial-up modems, Tax-Aid portal). Do not install or setup any other remote connections, including remote desktop software, without Tax-Aid's authorization. Remote access connections should timeout (be disconnected) after a maximum of one hour of inactivity. Tax-Aid does not permit split tunneling or other mechanisms that bridge unsecure networks with Tax-Aid's network.

Acceptable Use. Tax-Aid provides network resources and systems for business purposes. Any incidental non-business use of Tax-Aid's resources must be for personal purposes

only. Do not use Tax-Aid's resources for commercial purposes, personal gain, or any purpose that may create a real or perceived conflict of interest with Tax-Aid. Do not use Tax-Aid's resources in a manner that negatively impacts your job performance or impairs others' abilities to do their jobs. Do not use Tax-Aid's network or systems for activities that may be deemed illegal under applicable law.

Prohibited Activities. Tax-Aid prohibits using its resources to engage in activities such as (but not necessarily limited to) the following:

- gaining or attempting to gain unauthorized access to others' networks or systems;
- installing, distributing or attempting to distribute malicious, unlicensed or pirated software;
- committing criminal acts such as terrorism, fraud, identity theft or hacking;
- downloading, storing, or distributing pornography or other obscene materials or materials in violation of another's copyright;
- creating undue security risks or negatively impacting the performance of Tax-Aid's network and systems;
- uploading, downloading, or disseminating defamatory, discriminatory, vilifying, sexist, racist, abusive, rude, annoying, insulting, threatening, obscene, or otherwise inappropriate or offensive messages or media;
- disrupting the workplace environment, creating a hostile workplace, or invading the privacy of others.

Email and Social Media. Do not disclose Confidential Information to unauthorized parties on blogs or social media or transmit it in unsecured emails or instant messages. Do not make postings or send messages that speak for Tax-Aid or imply that you speak for Tax-Aid unless you have been authorized to do so. Never open an email attachment that you did not expect to receive, click on links, or otherwise interact with unexpected email content. Be cautious, even if messages appear to come from someone you know, since attackers can easily falsify (spoof) email senders. Tax-Aid may block some attachments or emails, based on risk. Do not respond to an email or other message that requests Confidential Information unless you have separately verified and are certain of its origin and purpose.

Asset Management. Tax-Aid will track and document all information assets, including hardware, software, and other equipment, using Tax-Aid's asset management system(s). This inventory tracking should include operating system levels and all installed software and software versions to support vulnerability identification and mitigation. Tax-Aid will update the asset inventory as assets are removed from the business. Confidential or Highly Confidential Information must have an assigned data owner who is responsible for tracking its location, uses, and any disclosures. Tax-Aid will properly dispose of all data and media to help avoid a breach of Confidential or Highly Confidential Information.

Protecting Information Assets. Only Tax-Aid-supplied or approved software, hardware, and information systems, whether procured or developed, may be installed in Tax-Aid's IT environment or connected to Tax-Aid's network. Tax-Aid will install and configure Tax-Aid-owned computers according to current technical standards and procedures,



including anti-virus software, other standard security controls, and approved operating system version and software patches. Tax-Aid supports preventive controls to avoid unauthorized activities or access to data, based on risk levels. Tax-Aid supports detective controls to timely discover unauthorized activities or access to data, including continuous system monitoring and event management. Tax-Aid may use technical controls, such as firewalls, access control lists, or other mechanisms, to segment some data or areas of its network according to risks. Do not alter network segmentation plans without approval.

Use of Personal Devices. Tax-Aid may permit volunteers to use their own equipment to connect to its network and systems. If you choose to do so, you agree that your use of those devices is subject to this Policy and any additional policies, procedures, standards, and processes Tax-Aid implements. Tax-Aid may require you to install specific security controls on your device (for example, device management software, access controls, encryption, remote wiping in case your device is lost or stolen, or other security controls).

You must allow Tax-Aid to review your device and remove any Confidential Information or other Tax-Aid data if your relationship with Tax-Aid terminates, you change devices or services, or in other similar situations. You must also promptly provide Tax-Aid with access to your device when requested for Tax-Aid's legitimate business purposes, including any security incident or investigation. Use encryption, other protection strategies (for example, device management software, access controls, remote wiping in case your device is lost or stolen, or other security controls), or both on any personal device that contains Confidential Information or other Tax-Aid data.

Use of Mobile Devices. Mobile devices, including those that provide access to Tax-Aid email, must be protected using a password or other approved authentication method. Do not connect a mobile device containing Confidential Information or other Tax-Aid data to any unsecured network without an up-to-date firewall configured (or other security controls in place). Unsecured networks include home networks, hotel networks, open or for-pay wireless hotspots, convention networks, or any other network that Tax-Aid has not approved or does not control. Physically secure any mobile devices you use to access or store Confidential Information or other Tax-Aid data. Never leave laptops or other devices unattended unless locked or otherwise secured. Do not leave mobile devices or the bags containing them visible in a parked car or check them as baggage on airlines or other public transportation.

Incident Response. Tax-Aid investigates all reported or detected security incidents and documents the outcome, including any mitigation activities or other remediation steps taken. Immediately notify Tax-Aid if you discover a security incident or suspect a breach in Tax-Aid's information security controls. Applicable law may require Tax-Aid to report security incidents that result in the exposure or loss of certain kinds of information to various authorities, affected individuals or organizations whose data was compromised, or both. Do not act on your own or make any external notifications without prior guidance and authorization.

## Client and Customer Relations

The success of the team to which you are assigned depends upon the quality of the relationships between the volunteers, staff, and clients. Regardless of your position, you are a Tax-Aid ambassador.

Here are several things you can do to help give the public a good impression of Tax-Aid:

- Act competently and deal with clients and co-workers courteously and respectfully.
- Communicate pleasantly and respectfully with other volunteers and staff at all times.
- Follow up on requests promptly, provide businesslike replies to inquiries, and perform all duties in an orderly manner.
- Take pride in your volunteer service and enjoy doing your best.

These are the building blocks for your success and the continued success of Tax-Aid.

## Harassment

We are committed to providing a volunteer environment in which all individuals are treated with respect. Each individual has the right to volunteer in an environment free of harassment and discrimination. Therefore it is the policy of Tax-Aid to prohibit harassment based on any protected characteristic, including discrimination and harassment on the basis of race, color, religion, citizenship, political activity or affiliation, marital status, age, national origin, ancestry, physical or mental disability, medical condition (as defined under California law), genetic information, veteran status, sexual orientation, sex or gender (which includes harassment and discrimination based on gender identity, gender expression, pregnancy, childbirth, or related medical conditions) or any other characteristics protected under federal, state, or local laws. All such harassment is illegal and will not be tolerated.

Tax-Aid's anti-harassment policy applies to all persons involved in the operation of Tax-Aid and prohibits illegal harassment by any volunteer or employee of Tax-Aid, including supervisors and co-workers or by someone not directly connected to Tax-Aid but with whom you might come into contact during your volunteer service, such as vendors, consultants, independent contractors, applicants or any other person.

Conduct prohibited by this policy is unacceptable at Tax-Aid and in any volunteer-related setting (such as during trips related to your service, volunteer-related meetings and trainings, and volunteer-related social functions) or when and where volunteer work is being conducted (such as during outreach work or off-site events).

Prohibited harassment may take many forms, but the most common forms include:

- Verbal Harassment - such as jokes, epithets, slurs, negative stereotyping and unwelcome remarks about an individual's body, color, physical characteristics, or appearance, questions about a person's sexual practices, or gossiping about sexual relations;
- Physical Harassment - such as physical interference with normal work, impeding or blocking movement, assault, unwelcome physical contact, leering at a

person's body, or threatening, intimidating or hostile acts that relate to a protected characteristic;

- Visual Harassment - such as offensive or obscene photographs, calendars, posters, cards, cartoons, e-mails, drawings, gestures, display of sexually suggestive or lewd objects, unwelcome notes or letters, or any other written or graphic material that denigrates or shows hostility or aversion toward an individual because of a protected characteristic, that is placed on walls, bulletin boards, or elsewhere on the employer's premises or circulated in the workplace.

There are two distinct categories of sexual harassment:

- Quid Pro Quo - When an individual's submission to or rejection of unwelcome sexual conduct is used as a basis for work-related decisions affecting that individual, including granting of benefits; and
- Hostile Environment - When unwelcome sexual conduct unreasonably interferes with an individual's work or creates an intimidating, hostile, or offensive working environment, even if it does not lead to tangible consequences.

Sexual harassment includes harassment of women by men, of men by women and same-gender harassment. Sexual harassment is unlawful whether it involves co-worker harassment, harassment by a supervisor or manager, volunteer harassment, or by persons doing business with or for Tax-Aid.

The Company prohibits any and all conduct that may reasonably be interpreted as harassment as defined above whether or not such conduct is pervasive enough or severe enough to meet the technical legal requirements of harassment.

## **Reporting and Investigation**

If you believe that you have been harassed or subjected to any form of unlawful discrimination or conduct that otherwise violates this policy, you must immediately report the facts of the conduct to the Executive Director, or the Board President so that any concern can be investigated and addressed appropriately. Your complaint should be specific and should include the names of the individuals involved and the names of any witnesses. You will be asked about details of the incident(s), names of the individuals involved and names of any witnesses. Supervisors will refer all harassment complaints immediately to the Board President or the Executive Director.

All complaints will be promptly and thoroughly investigated, and all information disclosed during the course of the investigation will remain confidential, except as necessary to conduct the investigation and take any remedial action, and in accordance with applicable law. All volunteers 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 dismissal. At the conclusion of its investigation, if the Company determines a violation of policy has occurred, it will take effective remedial action commensurate with the severity of the offense. Steps shall be taken, as reasonable and necessary, to prevent any further violations of policy.

## **Retaliation**

Retaliation for reporting any incidents of harassment or discrimination or participating in any investigation of harassment or discrimination is prohibited. Any report of retaliation by the one accused of harassment or discrimination, or by co-workers or managers will also be promptly and thoroughly investigated in accordance with the Company's investigation procedures.

The Company also strictly prohibits retaliation against volunteers for engaging in any form of protected activity and any other retaliation prohibited by law.

## **Standards of Conduct**

By accepting a volunteer position with Tax-Aid, you have a responsibility to the organization and to your fellow volunteers to adhere to certain rules of behavior and conduct. The purpose of these rules is not to restrict your rights, but rather to maintain a high standard of quality. We also want you to know what conduct is expected and necessary to provide quality services. When each person is aware that he or she can fully depend upon fellow volunteers to follow the rules of conduct, then our organization will be a better place to volunteer for everyone. See Code of Conduct page #28.

## **Dismissal**

Volunteers who do not adhere to the rules, policies and procedures of Tax-Aid, or who fail to satisfactorily perform their volunteer assignment, are subject to dismissal:

Volunteers may be dismissed without warning for just cause, as determined by Tax-Aid. Tax-Aid has the right to request a volunteer to leave immediately.

Grounds for immediate dismissal may include, but are not limited to:

- Breach of confidentiality.
- Negligence or any careless action which endangers the life or safety of yourself or another person.
- Unauthorized possession of dangerous or illegal firearms, weapons or explosives at a Tax-Aid site or while on duty.
- Threatening, intimidating or coercing fellow volunteers or Tax-Aid employees on or off the premises at any time, for any purpose.
- Malicious gossip and/or spreading rumors; engaging in behavior designed to create discord and lack of harmony; interfering with another volunteer or employee on the job; willfully restricting volunteer or employee output or encouraging others to do the same.
- Immoral conduct or indecency on site.
- Gross misconduct or insubordination.
- Being under the influence of alcohol or drugs while performing a volunteer assignment.
- Theft of property or misuse of Tax-Aid equipment, or materials.

- Lies or falsification of records.
- Illegal, violent or unsafe acts.
- Harassment, abuse or mistreatment of members of the public or co-workers.
- Unwillingness or inability to support and further the mission of the organization and/or the objectives of Tax-Aid.

## **Disciplinary Actions**

Unacceptable behavior may lead to immediate dismissal without warning. Depending on the nature of the behavior, it may also be addressed by a verbal warning, disciplinary suspension, or dismissal. Warnings will discuss the objectionable behavior and the consequences of this behavior. You will have the opportunity to explain your actions at the time the warning is issued.

## **Performance Feedback**

Volunteers and their supervisors are encouraged to have informal, open and honest discussion on an ongoing basis about work performance and goals of the volunteer. It is the intent of Tax-Aid that performance evaluations be constructive, supportive, flexible, and empowering. They should motivate the volunteer to aim for the highest standards and pinpoint where the organization can help the volunteer to achieve their goals. The evaluation procedure should offer the opportunity for volunteers to give ideas and to negotiate any needed changes.

A more formal performance review may be conducted at any time at the discretion of the volunteer's supervisor. As a result of performance feedback, volunteer development activities may be pursued. Volunteer development is a collaborative effort between supervisors and volunteers to align individual goals with the overall direction of Tax-Aid. Development efforts are focused on building the capabilities of all volunteers.

## **Open Door Policy**

In most instances, whenever you may have questions, suggestions, or concerns, your manager can provide a prompt response and assist in solving problems. We encourage you to express your ideas, comments, and concerns to your supervisor. If you do not receive a satisfactory response, if your supervisor is unavailable, or if you do not feel comfortable speaking to him or her, contact the Program Director.

## **Leaving Your Volunteer Assignment**

A volunteer may decide to end his or her service with Tax-Aid at any time and for any reason. Notice of the volunteer's decision to separate should be communicated as soon as possible to the Program Director.

### Separation from Tax-Aid Volunteer Involvement

- Voluntary separation from Tax-Aid occurs when a volunteer resigns or retires. Volunteers are encouraged to give Tax-Aid at least two weeks' notice of intent to resign in a written resignation letter stating the reason for leaving and the intended last day of work.

- A volunteer who does not report to work for three consecutive assignments without contacting his or her supervisor may be considered to have abandoned the position and voluntarily resigned from volunteer involvement.
- Involuntary separation occurs when a volunteer is discharged or when the position comes to an end.

# Risk Management

Together, our volunteers and their supervisors work together to minimize any potential risks to the volunteer or Tax-Aid. Volunteers are expected to adhere to Tax-Aid's policies.

## **Workplace Safety and Security**

Some of the best safety improvement ideas come from volunteers. Those with ideas, concerns or suggestions for improved safety and security in the workplace are encouraged to bring them to management's attention. Volunteers should feel free to report, without fear of retaliation, any condition which they believe poses a safety, health or security risk in the workplace. Tax-Aid will investigate such reports promptly and thoroughly and take appropriate corrective action. Each volunteer is expected to obey safety rules and to exercise caution in all work activities. Volunteers must immediately report any unsafe condition to their supervisor. Volunteers who violate safety standards, cause hazardous or dangerous situations, or who fail to report or remedy such situations, may be subject to discipline. In the case of accidents that result in injury, regardless of how insignificant the injury may appear, volunteers should immediately notify their supervisor.

## **Injuries While Volunteering**

All volunteers are expected to follow appropriate safety guidelines while volunteering. However, even under the best circumstances, an accident may occur. If a volunteer is injured, even slightly, the volunteer is expected to immediately stop the activity that caused the injury and seek first aid or medical attention if necessary. The volunteer must inform his or her supervisor about the incident and complete an incident report form. If the volunteer is unable to reach the supervisor, then the volunteer must contact the Program Director. The volunteer should not resume the activity until treatment has been provided and/or he or she has been given the approval from a supervisor to continue the activity. Volunteers who become unable to work because of a volunteer related illness or injury must inform their supervisor as soon as possible.

Volunteers are covered by their own private health insurance program for physical injuries while performing their volunteer responsibilities. Tax-Aid wants to ensure that if a volunteer is physically injured while performing an assigned duty, the volunteer will receive any necessary aid. Tax-Aid also requires volunteers to sign the Volunteer Agreement and Release of Liability. It is important that you immediately report to staff any injury you receive while volunteering. Please also notify Tax-Aid's Program Director and Executive Director of any injury you sustain while volunteering.

## **Insurance Coverage**

If the volunteer finds it necessary to use his/her personal vehicle while conducting Tax-Aid business, the volunteer's own personal automobile liability insurance coverage will

be considered primary coverage. Damage to the volunteer's personal vehicle will be covered under the physical damage clause of the volunteer's insurance policy.

Medical expenses incurred in conjunction with Tax-Aid volunteer activities which are not covered by the volunteer's private health insurance *may* be covered under Tax-Aid's general policy (this insurance is limited and subject to various conditions, and injured volunteers must first use their personal health and medical insurance).

### **Limitation on Liability for Volunteers**

Tax-Aid volunteers are not liable for harm caused by an act or omission of the volunteer on behalf of Tax-Aid if:

- The volunteer was acting within the scope of their Tax-Aid responsibilities at the time of the act or omission.
- 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.

### **Property and Theft**

Tax-Aid works to prevent property loss of any kind. All property used to conduct business belongs to Tax-Aid. Tax-Aid assumes no liability for personal property brought into the workplace or any Tax-Aid site.

### **Return of Property**

Volunteers are responsible for Tax-Aid property which includes all materials, files, keys, passwords or any other written or electronic information issued to volunteers or in volunteer's possession or control. All Tax-Aid property must be returned on or before your last day. Tax-Aid may take all actions deemed appropriate to recover or protect its property.





## ther Policies

### **Dress Code**

Volunteers are representatives of Tax-Aid and are responsible for presenting a positive image to constituents and the community. Volunteers will dress appropriately for the conditions and performance of their duties. A neat, tasteful appearance contributes to the positive impression you make on clients.

### **Expense Reimbursement**

You must have the Program Director's authorization prior to incurring an expense on behalf of Tax-Aid. To be reimbursed for all authorized expenses, you must submit an expense report accompanied by receipts. Please refer to the reimbursement policy.

### **Smoking**

It is the policy of Tax-Aid to provide a healthy workplace for all. Smoking is not allowed in any part of Tax-Aid's permanent or temporary facilities. If you smoke, use an appropriate area outside. Volunteers will not use any tobacco product while in direct public contact, or in situations where clients, employees or fellow volunteers may find it offensive.

### **Drug-Free Environment**

Tax-Aid provides a drug-free, healthy, and safe environment. While on Tax-Aid premises and while conducting Tax-Aid-related activities off Tax-Aid premises, a volunteer may not use, possess, distribute, sell or be under the influence of alcohol or illegal drugs. Occasionally, Tax-Aid may sponsor events where alcohol is served. In such situations, volunteers who consume alcohol are expected to act in a responsible manner. The legal use of prescribed drugs is permitted during volunteer service only if it does not impair a volunteer's ability to perform the essential functions of the volunteer position effectively and in a safe manner that does not endanger other individuals in the workplace. Volunteers must advise their supervisor if they are taking any prescription or over-the-counter drug which could adversely affect safety or performance.

### **Software**

Tax-Aid complies with all copyright laws for software programs installed and used on Tax-Aid computers. Volunteers are expected to adhere to Tax-Aid's policy, which includes prohibiting the use of unauthorized copies of software on Tax-Aid computers; prohibiting the installation of software on Tax-Aid computers that was not purchased in compliance with Tax-Aid's policy; preparing returns for themselves or any non-Tax-Aid client without written approval from the Executive Director; and understanding that all computers, software, and computer files/information is Tax-Aid property. Therefore, all who use Tax-Aid computers cannot assume any right to privacy in such use.

## **Non-Solicitation/Distribution of Literature**

Approaching fellow volunteers or employees in the workplace regarding personal activities, organizations or causes, regardless of how worthwhile, important or benevolent, can create unnecessary apprehension and pressures for fellow colleagues. In the interest of maintaining a proper business environment and preventing interference with work and inconvenience to others, volunteers may not distribute literature or printed materials of any kind, sell merchandise, solicit financial contributions, or solicit for any other cause in the workplace at any time. This policy also prohibits solicitations using the Tax-Aid e-mail distribution list or other communication systems. Any requests from outside persons or organizations to sell merchandise, solicit contributions, distribute literature, arrange displays or utilize Tax-Aid facilities are to be referred to the Executive Director.

## **Representing Tax-Aid**

Prior to any action or statement which might significantly affect or obligate Tax-Aid, volunteers must seek prior approval from their supervisor and/or Program Director. These actions may include but are not limited to public statements to the press, collaboration or joint initiatives, or any agreements involving contractual or other financial obligations. Volunteers are authorized to act as representatives of the organization as specifically indicated within their position/volunteer position descriptions and only to the extent of such written specifications.

## **Media Inquiries**

Tax-Aid will provide a response to media inquiries as soon as possible. It is imperative that we speak with one voice when dealing with the media. Selected staff members and volunteers are charged with handling media calls and requests for interviews. Should you receive an inquiry, please forward it to the Executive Director.

# Volunteer Agreement and Release of Liability

## Volunteer Agreement

The public perceives the decisions and actions of each volunteer as direct reflections on Tax-Aid itself. That is why we are asking you to sign this Volunteer Agreement stating that you understand and agree to the responsibilities, potential hazards, benefits, and other conditions of volunteering with Tax-Aid. In order to be a Tax-Aid volunteer you must sign this Agreement and either send it to us or agree to it on our website (tax-aid.org) as part of volunteer registration. At some point, it is possible that you may question or disagree with a Tax-Aid policy or decision. If this should happen, please don't hesitate to discuss the situation with Tax-Aid management, and remember it is very important that you continue to carry out your volunteer responsibilities professionally and in accordance with the Volunteer Agreement and the guidelines given to you over the course of your volunteer involvement. In the unlikely event we should consider your conduct inconsistent with Tax-Aid's mission, policies, or guidelines, Tax-Aid has sole discretion and may terminate your services as a volunteer.

## Volunteers Under the Age of 18

If you are under 18, you are welcome to become part of our volunteer program! Volunteering is an important responsibility and a great opportunity to learn. It is also true, however, that if you are under the age of 18, your parent or guardian needs to understand and sign this Agreement for you. For volunteers under the age of 14, a parent or guardian must be present with you at all times while volunteering with Tax-Aid. Your parent or guardian is also responsible for all your actions while you are carrying out any volunteer responsibilities.

1. **Agreement:** I understand that the public perceives the decisions and actions of each volunteer as direct reflections on Tax-Aid itself, and I agree to work with Tax-Aid in achieving its mission. I agree to perform my volunteer duties professionally and in accordance with this Agreement and the guidelines as set out in the Volunteer Handbook and Reference Manual.
2. **Agreement:** I have received and read a copy of the Tax-Aid Volunteer Handbook and Reference Manual. I understand that the policies, rules and benefits described in it are subject to change at the sole discretion of Tax-Aid at any time. **I agree to adhere to the procedures set out in the most recent Tax-Aid Volunteer Handbook and Reference Manual.**
3. **Agreement:** I agree that it is my desire and intention to perform voluntary services for Tax-Aid without financial or material compensation of any kind.
4. **Agreement:** I understand that my services are entirely voluntary and that nothing in this agreement creates any obligation by Tax-Aid to defend or indemnify me for any legal claims, including claims of malpractice.

5. **Agreement:** I understand that during the course of my volunteering confidential information may be made available to me. I understand that confidential information must not be released within or outside the Tax-Aid organization.
6. **Agreement:** I understand that my volunteer services may be terminated at any time by me or at the discretion of Tax-Aid.
7. **Agreement:** I understand that I must sign this Agreement in order to be part of Tax-Aid's Volunteer Program and that this document will become a permanent part of my volunteer file.
8. **Agreement:** I understand that if I am under the age of 18, I must have my parent or guardian sign this Agreement on my behalf prior to my engaging in any volunteer service with Tax-Aid.

## Safety

Tax-Aid takes the safety of our volunteers very seriously. Some of your activities as a volunteer could also demand a higher level of physical fitness. While we do nothing to limit your opportunities, you must select your activities responsibly and only assume tasks for which you are physically fit. As a volunteer, your safety as well as the safety of others must be of the highest priority, as it is for all who work for Tax-Aid. While serving as a volunteer, you are responsible for your actions with respect to the property, safety, and wellbeing of all members of the public involved in your activities.

9. **Agreement:** I am aware that in volunteering I may incur personal injury and/or damage to my personal property.
10. **Agreement:** I attest that I am physically fit, able, and qualified to participate in these volunteer activities, and that I am entering into these activities with full knowledge of the risks involved. I agree to accept any and all risks of personal injury, death, and/or property damage.
11. **Agreement:** I agree to assume responsibility for and indemnify Tax-Aid for any injury to any person, or damage to their property, caused by me while I am serving as a Tax-Aid volunteer.

## Photo Release

At times Tax-Aid staff and/or representatives take photographs of training classes, site activities, or special events. These photos may be used for Tax-Aid publications, presentations, or other media-related purposes. As volunteers may be included in these photos, we need your permission to use photographs in which you might appear.

12. **Agreement:** I understand and agree to Tax-Aid's use of my photograph for their publications, presentations, and/or other media-related purposes.

## Injuries

If you are injured while volunteering for Tax-Aid, your medical costs will be covered by your own health insurance. Tax-Aid may be able to reimburse you for a limited amount of out of pocket expenses. It is important that you immediately report to Tax-Aid staff

any injury you receive while volunteering. You must complete the necessary paperwork follow up with Tax-Aid's Program Director and Executive Director.

13. **Agreement:** I understand and agree that in the event I am injured while performing authorized volunteer services for Tax-Aid that any expenses will be paid by my own private health insurance or out of pocket. Accordingly, I also understand and agree that my sole remedy for any injury to me while performing volunteer services for Tax-Aid will be my own responsibility, and that I will not receive any other type of compensation from Tax-Aid.
14. **Agreement:** I hereby agree to follow the Center of Disease Control (CDC) and local health district guidelines and Tax-Aid policies and procedures for social distancing to reduce the spread of Novel Coronavirus or COVID-19. This will require me to maintain six (6) feet of distance between myself, fellow volunteers, and patrons of the organization as much as possible. I, also, agree to utilize masks to reduce the risk of exposure to myself and others. I agree to wash or sanitize my hands after using the restroom, sneezing, coughing, and adequately wearing and utilizing sterile gloves.

### **Release of Liability**

A release of liability is a common occurrence these days. When registering for most activities, you will find that the sponsoring organization requires a release of its liability: joining a health club, going to a theme park, or enjoying a whale-watching excursion all require some form of liability release. So we, too, ask you to sign a release of liability as a part of Tax-Aid's prudent risk management practices, and in order to protect Tax-Aid from potential frivolous lawsuits.

15. **Agreement:** I hereby release Tax-Aid, its officers, employees, and agents from any claims, lawsuits, or actions I, my heirs, or legal representatives may have for any personal injury and/or property damage I may incur as a result of my volunteer services.

## COVID-19 RELEASE AND WAIVER OF LIABILITY FOR PROVIDING VOLUNTEER SERVICES

### READ CAREFULLY – THIS DOCUMENT AFFECTS YOUR LEGAL RIGHTS:

I, wishing to volunteer my time and services for Tax-Aid, Inc., a nonprofit corporation that exists under the laws of California ("Tax-Aid"), hereby acknowledge that said organization is doing everything they can to protect the public as well myself as a volunteer. To this extent, I agree to follow Center of Disease Control (CDC), local health district guidelines and Tax-Aid policies and procedures to reduce the spread of Novel Coronavirus, or COVID-19. This will require me, for in-person meetings, to prove that I have been fully vaccinated and boosted against COVID-19 (as defined by the applicable CDC guidance in effect at the time that I volunteer), and wear a clean, undamaged face covering that completely covers my entire nose and mouth if required by local, state or federal law. I agree to follow any other public health safety guidelines requested by Tax-Aid staff or volunteer managers to keep everyone safe. This procedure will be required for visitor-to-visitor contact as well to limit exposure.

I understand that volunteering at this time subjects me to dangerous risks, including, but not limited to, coming in contact with persons who may have COVID-19 and/or contracting COVID-19. I understand that I as a volunteer, share the responsibility for my safety, for managing risks, and for determining my suitability for the program in which I will participate. I understand and acknowledge that it is impossible to anticipate every activity in which I will engage. I understand that these and other activities I participate in with Tax-Aid pose known and unknown risks and may cause injury, permanent disability or death. I agree to assume these risks.

I agree to utilize a clean, undamaged surgical or cloth face mask that completely covers my nose and mouth on all sides to reduce the risk of exposure to myself and others. I agree to wash or sanitize my hands after using the restroom, sneezing, and coughing, and will properly wear and utilize sterile gloves as needed.

For in-person volunteer work I certify that I have been fully vaccinated and boosted against COVID-19 (as defined by the applicable CDC guidance currently in effect). I understand and agree to present evidence of my fully-vaccinated status (vaccine card or QR code) along with photo identification to Tax-Aid.

I represent that I am fully capable of participating in this activity, without causing harm to others or myself. Therefore, I assume and accept full responsibility for me and for injury, death and loss of personal property and expenses suffered by me as a result of those inherent risks and dangers identified herein and those inherent risks and dangers not specifically identified, and as a result of my negligence in participating in this activity.

I represent that I do not currently exhibit and have not exhibited at any point in the last 48 hours, any of the symptoms of COVID-19, which, pursuant to CDC guidelines, include (but may not be limited to), fever, cough, or shortness of breath. I agree that if I begin to develop any of these symptoms, I will immediately let Tax-Aid know and will immediately cease all volunteer work.

Tax-Aid is not responsible for providing medical treatment for me, but if it does provide any, I release Tax-Aid from any claim arising from that treatment. I authorize Tax-Aid to obtain or provide emergency hospitalization, surgical or other medical care for me as provided in the consent for medical care provided below. I am responsible for my own insurance coverage, and I have no right to expect that Tax-Aid will provide insurance for me.

I agree that I will accept and abide by all of the Tax-Aid's rules and regulations and that violating these rules and regulations could place myself in danger of injury or death.

I agree that this agreement is intended to be as broad and inclusive as permitted by the laws of California and that this agreement will be governed by the laws of that state. If any portion of this agreement is held invalid, a court should revise it to make it enforceable.

I understand that this is the entire agreement between Tax-Aid and me, and that the agreement cannot be modified or changed in any way by any other representation or statement.

I HAVE CAREFULLY READ, UNDERSTAND, AND VOLUNTARILY SIGN THIS DOCUMENT. IN SIGNING THIS DOCUMENT, I FULLY RECOGNIZE THAT IF I BECOME SICK WHILE I VOLUNTEER WITH TAX-AID, I WILL HAVE NO RIGHT TO MAKE A CLAIM, FILE A LAWSUIT, OR COLLECT DAMAGES AGAINST TAX-AID OR ITS AFFILIATES, EVEN IF THEY NEGLIGENTLY CAUSED THE BODILY INJURY. I HEREBY WARRANT THAT I HAVE LEGAL AUTHORITY TO ACT ON MY BEHALF. I AGREE, ON MY OWN TO THE TERMS AND CONDITIONS IN THIS DOCUMENT.

Printed Name \_\_\_\_\_

Signature and Date \_\_\_\_\_

## TEMPERATURE SELF-CHECK AND HEALTH SCREENING POLICY

This policy applies to all employees, clients, patrons, volunteers, and other visitors for the duration of the coronavirus (COVID-19) pandemic. All other policies remain in effect unless otherwise noted.

### Screening Requirements

In order to stop the spread of COVID-19, all individuals entering Tax-Aid's premises must certify that they do not have a temperature of 100.4F° (38°C) or higher and that they exhibit no signs of a COVID-19 infection. They must also certify that they have been fully vaccinated and boosted against COVID-19 (as defined by the applicable CDC guidance currently in effect) and must present evidence of their fully-vaccinated status (vaccine card or QR code) along with photo identification, to Tax-Aid. Employees and volunteers who have temperatures or exhibit symptoms should stay home, notify their immediate manager, and contact their health care provider. Volunteers and clients who are not vaccinated may avail themselves of virtual tax services provided by Tax-Aid.

### Screening Process

Employees and volunteers will be provided with a health screening form. Employees and volunteers are asked to review the form each morning and determine if they are eligible to enter the workplace. Upon their arrival at work, employees and volunteers will be asked to affirm that they have reviewed the health certification form and are eligible to enter the worksite. Employees and volunteers are not required to disclose their exact body temperature. The identities of any employees or volunteers who are disqualified from coming to work based on their answers will be kept confidential.

All individuals who visit Tax-Aid's premises are required to wear clean, undamaged surgical or cloth face masks that completely cover the nose and mouth on all sides as required by local, state or federal law.

### Accommodations

Employees who are unable to participate in temperature checks, vaccinations, or health certifications due to disability or sincerely-held religious belief should contact Executive Director, Jill Sturm. Tax-Aid complies with all applicable federal, state, and local workplace laws.

Printed Name \_\_\_\_\_

Signature and Date \_\_\_\_\_



## COVID-19 SYMPTOM SCREENING SELF-ASSESSMENT

Do you have a temperature 100.4°F (38°C) or higher?

- Yes
- No

In the past 24 hours, have you experienced any of the following symptoms?

- Fever or chills
- Cough
- Shortness of breath or difficulty breathing
- Fatigue
- Muscle or body aches
- Headache
- New loss of taste or smell
- Sore throat
- Congestion or runny nose
- Nausea or vomiting
- Diarrhea

In the past 24 hours, have you experienced any of the following symptoms? (Note: The symptoms listed below are considered more serious symptoms of COVID-19. If you have any of the symptoms listed below, please seek emergency care.)

- Trouble breathing
- Persistent pain or pressure in the chest
- New confusion
- Inability to wake or stay awake
- Bluish lips or face

To the best of your knowledge, have you come into contact with any person who has tested positive for COVID-19 for or shown any of the symptoms listed above?

- Yes
- No

Do you have any reason to believe that you or any member of your household currently has a COVID-19 infection or has been exposed to someone with a COVID-19 infection?

- Yes
- No

If you answered "Yes" to any of the questions above, please remain at home and notify your immediate manager and your health care provider. If you are unable or unwilling to complete this certification, please contact Executive Director, Jill Sturm

**VOLUNTEER AGREEMENT AND RELEASE OF LIABILITY**

**This agreement and my release of all liability is entered into on:**

\_\_\_\_ / \_\_\_\_ / \_\_\_\_  
*Date*

**VOLUNTEER SIGNATURE**

\_\_\_\_\_

**I have read and understand the volunteer agreement and release of liability.**

\_\_\_\_\_  
*Name of Volunteer*

\_\_\_\_\_  
*Signature of Volunteer*

**IF VOLUNTEER IS A MINOR**

**If volunteer is a minor (under the age of 18), this form must be signed by parent or legal guardian.**

\_\_\_\_\_  
*Name of Parent or Legal Guardian*

\_\_\_\_\_  
*Signature of Parent or Legal Guardian*

# Code of Conduct

This is the Code of Conduct form to be signed by volunteers. All Tax-Aid volunteers, in delivering Tax-Aid services and in all other Tax-Aid activities, shall meet the following standards of conduct: No volunteer or employee shall:

- \_\_\_a. Authorize the use of or use for the benefit or advantage of any person, the name, emblem, endorsement, services, or property of Tax-Aid, except in conformance with Tax-Aid 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 affiliation with Tax-Aid.
- \_\_\_c. Publicly use any Tax-Aid affiliation in connection with the promotion of partisan politics, religious matters, or positions on any issue not in conformity with the official position of Tax-Aid.
- \_\_\_d. Disclose or use any confidential Tax-Aid information that is available solely as a result of the volunteer's affiliation with Tax-Aid to any person not authorized to receive such information, or use to the disadvantage of Tax-Aid any such confidential information, without the express authorization of Tax-Aid.
- \_\_\_e. Knowingly take any action or make any statement intended to influence the conduct of Tax-Aid 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.
- \_\_\_f. Operate or act in any manner that is contrary to the best interests of Tax-Aid.
- \_\_\_g. Operate or act in a manner that creates a conflict with the interests of Tax-Aid and any organization in which the individual has a personal, business, or financial interest. The individual shall disclose such conflict of interest to the Tax-Aid Board President or the Executive Director, as applicable, upon becoming aware of it. Where required, the individual shall absent himself or herself during deliberations, and shall refrain from participating in any decisions or voting in connection with the matter.

## Tax-Aid Code of Conduct Certification and Disclosure

I, \_\_\_\_\_, certify that I have read and understand the Code of Conduct of Tax-Aid and agree to comply with it, as well as applicable laws that impact the organization, at all times.

### **DISCLOSURE OF ACTUAL OR POTENTIAL CONFLICTS**

I affirm that, except as listed below, I have no personal, business, or financial interest with any organization that conflict, or appear to conflict, with the best interests of Tax-Aid:

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### **FUTURE ACTUAL OR POTENTIAL CONFLICTS**

At any time during the term of my volunteer status with Tax-Aid, should an actual or potential conflict of interest arise between my personal, business, or financial interests and the interests of Tax-Aid, I agree to:

- \_\_\_ a. Disclose promptly the actual or potential conflict to the Executive Director or board president, as applicable; and
- \_\_\_ b. Until Tax-Aid approves actions to mitigate or otherwise resolve the conflict, refrain from participating in any discussions, deliberations, decisions or voting related to the conflict of interest.

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*Printed Name*

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*Signed Name*