



POLICIES

September 17, 2024

Policies of Little Brothers – Friends of the Elderly Upper Michigan adopted at a regular meeting of the Board of Directors on September 17, 2024
Volunteer Copy

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Tax Exempt Status:

LBFE is a tax-exempt non-profit organization IRS 501 (c)(3)

IRS Employer Identification Number (EIN):

38-2411631

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INTRODUCTION

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) is governed by the Board of Directors as outlined in the bylaws and is an independent member of the LBFE National Network. The National Network is governed by the Network Chapter Membership Agreement which outlines the roles, rights, and responsibilities of the U.S. chapters and includes operational standards, identity standards, and areas for chapter fundraising. The National Network is composed of five representatives, one representative from each member chapter. The National Network is an independent member of the International Federation. The International Federation is governed by a general assembly and a board under the leadership of its presidents.

The LBFEUM Chapter is independent of the Little Brothers – Friends of the Elderly Upper Michigan Foundation that was established in 2014 to secure the future of the LBFEUM Chapter through planned giving.

BASIC TENENTS

Code of Ethics:

- Act honestly, truthfully, and with integrity in all our transactions and dealings.
- Avoid actual or apparent conflicts of interest.
- Treat all individuals with dignity, respect, and provide conditions that safeguard their rights and welfare.
- Be responsible, transparent, and accountable for all our actions.
- Protect and ensure the proper use of the chapter assets.
- Comply with all applicable laws and regulations.
- Review and update LBFEUM policies and procedures as often as needed to remain up-to-date with applicable laws.

Core Values and Goals:

- Bring our stakeholders (elderly friends, staff, volunteers, and board members) together to join in life's celebration.
- Befriend lonely elderly people who do not have strong social circles and who desire to build friendships based on mutual respect.
- Accompany our elderly forever friends to the end of their lives.
- Be understanding partners in the aging process.
- Provide opportunities for people to discover, express, develop, and experience their individuality.
- Welcome people of all generations and backgrounds to celebrate life.
- Recognize and respond to the unique needs of our elderly friends.
- Assist individual elders so they may retain their dignity and independence.
- Recruit, train, and recognize competent and effective staff, volunteers, and board members.
- Provide opportunities for contributors (individuals, groups, corporations, and foundations) to fund our work.
- Collaborate with other service providers to meet the needs of the elderly.
- Promote awareness of LBFEUM and the needs of elders growing old alone.
- Grow and adapt to meet the changing needs of new and existing elderly friends throughout Upper Michigan.

Operating Principles Among Staff, Volunteers, and Board Members:

- Unity – Be supportive of each other’s work.
- Communication – Understand, adapt, and instruct for different communication and learning styles. Seek, listen, and respond respectfully.
- Stewardship – Ensure responsible and creative use of resources.
- Effectiveness – Manage work with clear objectives and high standards.
- Continuous Improvement – Evaluate the quality of our work and the impact of our programs and services.
- Leadership – Encourage and empower staff, volunteers, and board members to identify, cultivate, and realize their potential.

POLICIES

Background Check Policy

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) will conduct a mandatory criminal background check and motor vehicle records on all prospective staff, volunteers, and board members. Based on the information obtained from the background check, it shall be the responsibility of the authorized individual to make the final decision as to whether a candidate meets the onboarding criteria. No one subject to a background check will be allowed to begin working until the background results have been received and cleared by an authorized individual.

A nationwide background check will be conducted on individuals who have not been a Michigan resident for the past seven (7) years. A statewide background check will be conducted on individuals who do not require a nationwide search and volunteers who deliver home meals to the elderly on the holidays.

LBFEUM will not employ or assign any volunteer convicted of a state and/or federal criminal offense within the past seven (7) year pertaining to:

- 1) Crimes involving drugs including, but not limited to, unlawful possession, distribution, or intent to distribute unlawfully.
- 2) Crimes involving physical violence including but not limited to, abuse of children or elderly, abduction, manslaughter, murder, robbery, sexual crimes, and assault and battery.
- 3) Crimes involving the illegal use or possession of weapons including, but not limited to, guns, knives, explosives or other dangerous objects.
- 4) Crimes involving fraud, dishonesty or embezzlement.
- 5) Crimes against property including but not limited to, arson, theft, larceny and burglary.
- 6) Crimes showing dishonesty including but not limited to, fraud, deception or financial exploitation of any person, (i.e. worthless checks, extortion or falsifying documents.)

LBFEUM will not employ or assign any volunteer whose Motor Vehicle Records within the past three (3) years indicate:

- 1) The driver's license has been revoked, suspended, or invalid.
- 2) One violation for driving without insurance.
- 3) One at-fault accident.
- 4) Two moving violations.
- 5) Driving under the influence (DUI) or driving while intoxicated (DWI) convictions.

An authorized individual shall not refuse to consider a viable candidate simply because of an arrest that did not result in a conviction.

An authorized individual will review any conviction for felony or misdemeanor crimes that antedate the request for such information by more than seven (7) years.

Based on the information obtained from the background check, it shall be the responsibility of the authorized individual to make the final decision as to whether a candidate meets the criteria outlined in this policy.

Information obtained from a background check shall remain confidential and not shared with anyone except on a need-to-know basis.

If a candidate is a minor under the age of 18 a background check will not be conducted. References may be required. It shall be the responsibility of the authorized individual to approve the minor for volunteering.

Computers, Smart Devices, and Internet Usage

LBFEUM computers are for business use only to ensure safe and secure operation. Use of LBFEUM computers for personal use is prohibited, including access to personal email and documents.

Only approved individuals are authorized to install computer updates, hardware, and software on LBFEUM devices. Downloading, copying, and/or storing any unauthorized data or software on any computer is strictly prohibited. This includes both network servers and local workstations.

Sharepoint is required to be used for collaborative work document sharing. OneDrive is to be used for non-collaborative work, specific to your position.

Connection of personal devices (hardwired or wireless) to LBFEUM property is prohibited.

All users will be given an individual login I.D. that shall not be shared. All workstations shall be logged off at the end of the workday.

All assigned laptops are property of LBFEUM and need to remain in the possession of the user who shall not allow people not employed by LBFEUM to use their assigned laptop.

If technical support is required for computers, printers, phones, the internet, etc., you must submit a ticket to the approved and current IT support team. You are not permitted to have non-LBFEUM personnel provide IT support without the approval of the Executive Director.

Dress Code

LBFEUM dress code is business casual unless your specific task for your job or the day requires less formal or more formal attire. Clothing is required to be clean and in good condition. Close-toed, well-fitting shoes are required for all positions.

Some examples of inappropriate attire include clothing or accessories printed with offensive language, dirty clothing, pajamas, and open-toed sandals.

Emergency Executive Orders

In case of an environmental or health emergency, LBFEUM will follow mandates or Executive Orders directed by the federal, state, local officials regarding suspending activities, sheltering in place, or stopping unessential business. If such an order is given, the Executive Director will determine which staff are considered essential and will notify all staff and implement our Emergency Action Plan (EAP). Essential staff have tasks which are critical to the operation of the organization.

When anticipating a work-from-home situation as a possibility, all staff should leave each day prepared not to return to the office the next day.

The decision to reopen the office and to resume programs following an emergency will be made by the Executive Director under the supervision of the Board of Directors and in compliance with the Emergency Action Plan. While permission may be granted from federal, state and local officials to reopen or resume, LBFEUM reserves the right to resume in a manner considered safest for our staff, volunteers, board members, and elders.

Photo Use Policy

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) often takes photos of staff, volunteers, board members, and elderly friends. We may use these photos to illustrate our mission to the wider community through print and digital media including but not limited to the following: newspaper, press releases, newsletters, fundraising letters, annual report, posters, brochures, electronic slideshows, website, and social media.

Staff, volunteers, board members, and elderly friends may withdraw consent by giving written notice.

Purchasing and Credit Card Use Policy

The Executive Director will approve, establish limits, and issue all LBFEUM credit cards in the name of the staff member (card holder). The credit card shall only be used by the card holder whose name is on the card. The card holder may not share the card with any other individual (purchaser), for example another staff member, volunteer, or intern without permission of the Executive Director. The purchaser shall request permission of the card holder to use the credit card before each purchase. Shared credit cards must be signed out, returned promptly after purchase, and signed back in. The card shall only be used for official LBFEUM business, including event food and/or supplies, postage, staff/volunteer food, and office supplies. All card holders need to use their credit card instead of cash.

All purchases must be tax-exempt. All purchases over \$100 require pre-approval from the card holder or Executive Director. All in-store credit purchases must be a minimum of \$20. Tipping on meals shall not exceed 20%.

The purchaser is responsible for collecting receipts for all purchases. Each receipt needs to be scanned with the following information: purchaser name, purpose, vendor (merchant), and amount. The card holder is responsible for reconciling their credit card statements. Reconciled statements with receipts need to be given to the supervisor for review within one week of receiving the statement before going to the bookkeeper. Any expenses without proof of official LBFEUM business will be considered personal and need to be reimbursed to LBFEUM by the staff member within 48 hours of discovery.

The card holder is responsible for the card's protection and custody and shall immediately notify the credit card company and the Executive Director if it is lost or stolen. The card holder must immediately surrender the card to the Executive Director when affiliation with LBFEUM has ended.

Safety Policy

Little Brothers - Friends of the Elderly Upper Michigan Chapter (LBFEUM) is committed to providing a safe environment. Assignments can involve physically demanding work and unpredictable environments. Individuals should follow the directions of their supervisor or lead volunteer on site and follow all safety precautions, including proper personal hygiene, during their assignment.

LBFEUM will provide training, personal protection equipment, and supplies required for the assignment. Individuals need to inform your supervisor of your location and duration. Arrive prepared for your assignment by wearing appropriate clothing, in accordance with our dress code. For example, sturdy, close-toed boots or shoes at the woodlot.

Stay alert and keep an open pathway for egress. If you feel uncomfortable, unsafe, or threatened while on assignment, leave or find shelter, and call your supervisor or the Executive Director immediately.

Legal (recreational) and illegal drugs, alcohol, tobacco, smokeless tobacco, and vaping on LBFEUM property (including vehicles) is strictly prohibited. Smoking and vaping within 30 feet of any doorway, entrance to a building owned or rented by LBFEUM, or at parking lot entrances/exits is prohibited. Smoking or vaping is not permitted inside the vehicle by anyone, including elderly passengers. Operating or driving machinery is prohibited while on prescribed medication which warns against driving or operating machinery.

Driving under the influence of alcohol, prescription drugs, illicit or controlled substances is prohibited and grounds for immediate termination.

Any inappropriate activity that can cause injury to self or others is prohibited. This includes but is not limited to roughhousing, fighting, and the careless use of equipment.

Service Animal, Emotional Support Animal, Pet Policy

Definitions:

Service Animal as defined by the **Americans with Disabilities Act (ADA):**

Service animals are defined as dogs that are individually trained to do work or perform tasks for people with disabilities. Examples of such work or tasks include guiding people who are blind, alerting people who are deaf, pulling a wheelchair, alerting and protecting a person who is having a seizure, reminding a person with mental illness to take prescribed medications, calming a person with Post Traumatic Stress Disorder (PTSD) during an anxiety attack, or performing other duties. Service animals are working animals, not pets. The work or task a dog has been trained to provide must be directly related to the person's disability. Dogs whose sole function is to provide comfort or emotional support do not qualify as service animals under the ADA.

Emotional Support, Therapy, Comfort, or Companion Animals:

Any animal that provides companionship, relieves loneliness, and sometimes helps with depression, anxiety, and certain phobias, but does not have special training to perform tasks that assist people with disabilities. These animals are not limited to working with people with disabilities and therefore are not covered by federal laws protecting the use of service animals. Therapy animals provide people with therapeutic contact, usually in a clinical setting, to improve their physical, social, emotional, and/or cognitive functioning.

Pet

A domestic animal kept for companionship.

Policy:

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) allows service animals in all spaces open to the public on LBFEUM property, in vehicles owned by LBFEUM, and at all LBFEUM events.

LBFEUM requires the owner to be responsible for the care and supervision of his or her service animal.¹ If a service animal cannot be controlled by the owner, LBFEUM reserves the right to deny access to a disruptive animal. Uncontrolled barking, jumping on or around people, or running away from the owner are examples of uncontrolled behavior for a service animal.

If a volunteer of LBFEUM is unwilling or unable to provide transportation for a person with a service animal, another driver will be provided.

LBFEUM does not allow emotional support, comfort, companion animals, or pets on LBFEUM property, including vehicles, or at any LBFEUM events.

Certified therapy dogs will be allowed at designated events with prior approval of the Executive Director.

¹Under the ADA, service animals must be harnessed, leashed, or tethered, unless these devices interfere with the service animal's work or the individual's disability prevents using these devices. In that case, the individual must maintain control of the animal through voice, signal, or other effective controls.

Volunteer Protection Policy

Little Brothers - Friends of the Elderly Upper Michigan Chapter (LBFEUM) shall carry liability insurance that covers all volunteer actions, including driving and firewood processing. It shall have a minimum of a \$2,000,000 aggregate limit with a \$1,000,000 max each year per act and a limit of 2 acts a year if they total \$2,000,000.

Whistleblower Protection

All staff, volunteers, and board members are responsible for reporting concerns about violations of LBFEUM policies, operating principles, or suspected violations of law or regulations that govern LBFEUM's operations.

It is contrary to the values of LBFEUM for anyone to retaliate against any staff, volunteers, or board members who in good faith reports a violation of policies, principles, or a suspected violation of law. These include complaints of discrimination, suspected fraud, or suspected violation of any regulation governing the operations of LBFEUM. Any staff or board member who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of employment.

LBFEUM has an open-door policy where staff can share their questions, concerns, suggestions, or complaints with their supervisor. If you are not comfortable speaking with your supervisor, follow the chain of command. Staff with concerns or complaints may also submit their concerns in writing.

Supervisors and managers must report complaints or concerns about suspected ethical and legal violations in writing to the Executive Director or Board of Directors, who have the responsibility to investigate all reported complaints.

The LBFEUM Executive Committee is responsible for ensuring that all complaints about unethical or illegal conduct are investigated and resolved. The Finance Committee shall also be notified of any concerns or complaints regarding accounting practices, internal controls, or auditing and work with the Executive Committee until the matter is resolved.

Zero Tolerance Policy

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) will not tolerate violence, threats, harassment, sexual harassment, intimidation, discriminatory behavior based on an individual's race, color, religion, age, sex, national origin, disability, genetics, ethnicity, ancestry, protected veteran status, sexual orientation, gender identity and expression, or any disruptive behavior, either physical or verbal, that occurs in the workplace or other areas.

Staff, volunteers, board members, and elderly friends are expected to provide a safe environment. Aggression or violence can include oral or written statements, gestures, or expressions that communicate a direct or indirect threat of physical harm, damage to property, or any intentional behavior that may cause a person to feel threatened will not be tolerated.

Staff, volunteers, board members, and elderly friends shall not ignore violent, threatening, harassing, discriminatory, intimidating, or other disruptive behavior, and will report it immediately to their supervisor, the Executive Director, or the Executive Committee of the Board of Directors.

Conflict of Interest Policy: (Volunteer Copy)

No staff, volunteer, or board member of Little Brothers – Friends of the Elderly (LBFEUM) shall maintain or engage in any outside business or financial interest which conflicts with the interests of LBFEUM, or which interferes with their ability to fully perform their job responsibilities.

I understand that as a staff, volunteer, or board member of LBFEUM, I shall have no proprietary or financial interest in any business that furnishes products, materials, or services to LBFEUM or in any related transaction. Nor will I benefit directly or indirectly from a third party who furnishes products, materials, or services to LBFEUM.

I will disclose any potential conflicts of interest for clarification and review. If a conflict of interest is determined, I will abstain from discussion, decision-making, and voting where the conflict of interest is applicable.

I have read and understood this Conflict of Interest Policy. I understand that my service as a staff, volunteer, or board member with LBFEUM is contingent upon my compliance with this policy.

Driver Policy: (Volunteer Copy)

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) staff, volunteers, and board members who transport the elderly must be experienced drivers at least 19 years of age. Drivers must have a valid, non-probationary driver's license and no disability that may impair the ability to drive safely.

Staff, volunteers, and board members using a personal vehicle for LBFEUM purposes assume responsibility for said vehicle. All staff, volunteers, and board members who use personal vehicles for LBFEUM business must have a current driver's license, valid vehicle registration, and vehicle liability insurance in at least the minimum amounts required by state law.

Staff, volunteers, and board members must notify the program coordinator or Executive Director if their driver's license, vehicle registration, or insurance has been restricted, revoked, suspended, expired, or is invalid.

Vehicles are required to be in good working order, have operational temperature controls, and be in safe mechanical condition. Interiors of cars need to be clean and tidy.

LBFEUM vehicles shall not be used for personal use without the permission of the Executive Director. LBFEUM vehicles shall not be driven outside of their county of origin unless for an approved program transport, an approved program activity, or approved by the Executive Director.

I have a valid driver's license and the motor vehicle that I drive has valid insurance and registration as required by the State of Michigan. I agree to notify the Executive Director at LBFEUM of the suspension, restriction, expiration, or revocation of my driver's license, registration, and/or automobile insurance as required by the State of Michigan.

I also state that I DO NOT have any current or pending moving violations, have not had any for the last three (3) years, have had no at fault auto accidents in the last three (3) years, no driving without insurance violations for the last three (3) years, and no driving while under the influence or intoxicated convictions in the last three (3) years.

I have read and understood this Driver Policy. I understand that my service as a staff, volunteer, or board member with LBFEUM is contingent upon my compliance with this policy.

[Limitations Policy: \(Volunteer Copy\)](#)

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) is a friendship organization and does not provide professional services for individuals including financial planning, legal advice, medical advice, or social work. Staff, volunteers, and board members shall refrain from providing individual professional services to elderly friends of LBFEUM even if qualified.

LBFEUM may occasionally host informational workshops that are not intended to provide individual advice. Staff, volunteers, and board members may help our elderly friends navigate available professional services without recommending one provider over another by providing a minimum of three (3) choices.

LBFEUM prohibits staff, volunteers, and board members from:

- Serving as executor of an estate.
- Serving as a conservator or guardian.
- Serving as a representative payee.
- Handling an elder's finances.
- Preparing an elder's taxes.
- Providing legal advice.
- Providing financial advice.
- Making a specific referral to a for-profit enterprise.

I shall refrain from providing counseling, therapy, financial, medical, and legal advice even if I am qualified.

I shall refrain from providing any professional or personal advice or services including but not limited to an executor of their estate, conservator or guardian, representative payee or handling their finances or preparing their taxes.

I have read and understood this Limitations Policy. I understand that my service as a staff, volunteer, or board member with LBFEUM is contingent upon my compliance with this policy.

Non-Disclosure Policy: (Volunteer Copy)

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) maintains that all information regarding the organization, its staff, volunteers, board members, donors, and elderly friends of LBFEUM is confidential and must be safeguarded by all staff, volunteers, and board members who have access to the information.

Confidential information may consist of but is not limited to the following: LBFEUM processes, financial data, salary data, marketing data, business plans and strategies, negotiations and contracts, research, and elderly, donor, volunteer, or contribution lists.

Such information, knowledge or data relating to the confidence of the elderly in the care of LBFEUM may consist of, but without limitation, the following: an elder's financial or health information, legal or criminal history, or any personal information disclosed to me in confidence by an elder.

I will maintain the privacy and confidentiality of all staff, volunteers, board members, donors, elders, organizational information, and data both during and after my service with LBFEUM.

I will never disclose or use any confidential information, knowledge, or data which I receive or develop during my employment or volunteerism with LBFEUM.

I further agree that upon termination of my service as a staff, volunteer, or board member with LBFEUM, I shall promptly return any documents containing the above information or relating thereto LBFEUM. This agreement shall be binding upon my successors, heirs, assigns, and personal representatives.

I have read and understood this Non-Disclosure Policy. I understand that my service as a staff, volunteer or board member with LBFEUM is contingent upon my compliance with this policy. Even if my service as a staff, volunteer, or board member is terminated or ends, my obligations of confidence and non-disclosure continue forever.

Repudiation of Gifts/Bequests Policy: (Volunteer Copy)

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) staff, volunteers, and board members shall not accept individual cash gifts, planned gifts, bequests, or non-financial gifts from an elderly friend of LBFEUM or serve as a trustee, executor, or agent for an estate of an elderly friend with whom they were not acquainted prior to their association with the organization.

I understand that as a staff, volunteer, or board member of LBFEUM I represent an organization whose chief concern is the welfare of the elderly friends it serves. I understand that some of these elderly, may on occasion desire to give a gift to me.

I hereby agree that I will refuse any and all gifts in kind with a value greater than \$35 in any given calendar year. I will also refuse all cash gifts of any amount which may otherwise be given to me by any elderly friend. I will not accept a bequest from an elderly friend or serve as a trustee, executor, or agent for the estate of an

elderly friend with whom they were not acquainted prior to their association with the organization. I further agree that if, at the death of an elderly friend, I learn I have been named a beneficiary or to serve as a trustee, executor, or agent, I will promptly inform LBFEUM and disclaim the bequest or renounce the appointment, as applicable.

I have read and understood this Repudiation of Gifts/Bequests Policy. I hereby renounce and reject any and all benefits, interests, gifts, bequest, and annuities that do, may, or might accrue to me under instruments executed by any elderly friends with whom I was not acquainted prior to my association with the organization.

I understand that my service as a staff, volunteer, or board member with LBFEUM is contingent upon my compliance with this policy. I also understand if my service as a staff, volunteer, or board member is terminated or ends, my obligations under this Repudiation of Gifts/Bequests Policy continue indefinitely unless released in writing by action of the LBFEUM board.

SIGNATORY PAGES

Conflict of Interest Policy: (Signature Required)

No staff, volunteer, or board member of Little Brothers – Friends of the Elderly (LBFEUM) shall maintain or engage in any outside business or financial interest which conflicts with the interests of LBFEUM, or which interferes with their ability to fully perform their job responsibilities.

I understand that as a staff, volunteer, or board member of LBFEUM, I shall have no proprietary or financial interest in any business that furnishes products, materials, or services to LBFEUM or in any related transaction. Nor will I benefit directly or indirectly from a third party who furnishes products, materials, or services to LBFEUM.

I will disclose any potential conflicts of interest for clarification and review. If a conflict of interest is determined, I will abstain from discussion, decision-making, and voting where the conflict of interest is applicable.

I have read and understood this Conflict of Interest Policy. I understand that my service as a staff, volunteer, or board member with LBFEUM is contingent upon my compliance with this policy.

PRINTED name of volunteer

SIGNATURE of volunteer

Date (mm/dd/year)

Driver Policy: (Signature Required)

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) staff, volunteers, and board members who transport the elderly must be experienced drivers at least 19 years of age. Drivers must have a valid, non-probationary driver’s license and no disability that may impair the ability to drive safely.

Staff, volunteers, and board members using a personal vehicle for LBFEUM purposes assume responsibility for said vehicle. All staff, volunteers, and board members who use personal vehicles for LBFEUM business must have a current driver’s license, valid vehicle registration, and vehicle liability insurance in at least the minimum amounts required by state law.

Staff, volunteers, and board members must notify the program coordinator or Executive Director if their driver’s license, vehicle registration, or insurance has been restricted, revoked, suspended, expired, or is invalid.

Vehicles are required to be in good working order, have operational temperature controls, and be in safe mechanical condition. Interiors of cars need to be clean and tidy.

LBFEUM vehicles shall not be used for personal use without the permission of the Executive Director. LBFEUM vehicles shall not be driven outside of their county of origin unless for an approved program transport, an approved program activity, or approved by the Executive Director.

I have a valid driver’s license and the motor vehicle that I drive has valid insurance and registration as required by the State of Michigan. I agree to notify the Executive Director at LBFEUM of the suspension, restriction, expiration, or revocation of my driver’s license, registration, and/or automobile insurance as required by the State of Michigan.

I also state that I DO NOT have any current or pending moving violations, have not had any for the last three (3) years, have had no at fault auto accidents in the last three (3) years, no driving without insurance violations for the last three (3) years, and no driving while under the influence or intoxicated convictions in the last three (3) years.

I have read and understood this Driver Policy. I understand that my service as a staff, volunteer, or board member with LBFEUM is contingent upon my compliance with this policy.

PRINTED name of volunteer

SIGNATURE of volunteer

Date (mm/dd/year)

Limitations Policy: (Signature Required)

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) is a friendship organization and does not provide professional services for individuals including financial planning, legal advice, medical advice, or social work. Staff, volunteers, and board members shall refrain from providing individual professional services to elderly friends of LBFEUM even if qualified.

LBFEUM may occasionally host informational workshops that are not intended to provide individual advice. Staff, volunteers, and board members may help our elderly friends navigate available professional services without recommending one provider over another by providing a minimum of three (3) choices.

LBFEUM prohibits staff, volunteers, and board members from:

- Serving as executor of an estate.
- Serving as a conservator or guardian.
- Serving as a representative payee.
- Handling an elder’s finances.
- Preparing an elder’s taxes.
- Providing legal advice.
- Providing financial advice.
- Making a specific referral to a for-profit enterprise.

I shall refrain from providing counseling, therapy, financial, medical, and legal advice even if I am qualified.

I shall refrain from providing any professional or personal advice or services including but not limited to an executor of their estate, conservator or guardian, representative payee or handling their finances or preparing their taxes.

I have read and understood this Limitations Policy. I understand that my service as a staff, volunteer, or board member with LBFEUM is contingent upon my compliance with this policy.

PRINTED name of volunteer

SIGNATURE of volunteer

Date (mm/dd/year)

Non-Disclosure Policy: (Signature Required)

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) maintains that all information regarding the organization, its staff, volunteers, board members, donors, and elderly friends of LBFEUM is confidential and must be safeguarded by all staff, volunteers, and board members who have access to the information.

Confidential information may consist of but is not limited to the following: LBFEUM processes, financial data, salary data, marketing data, business plans and strategies, negotiations and contracts, research, and elderly, donor, volunteer, or contribution lists.

Such information, knowledge or data relating to the confidence of the elderly in the care of LBFEUM may consist of, but without limitation, the following: an elder’s financial or health information, legal or criminal history, or any personal information disclosed to me in confidence by an elder.

I will maintain the privacy and confidentiality of all staff, volunteers, board members, donors, elders, organizational information, and data both during and after my service with LBFEUM.

I will never disclose or use any confidential information, knowledge, or data which I receive or develop during my employment or volunteerism with LBFEUM.

I further agree that upon termination of my service as a staff, volunteer, or board member with LBFEUM, I shall promptly return any documents containing the above information or relating thereto LBFEUM. This agreement shall be binding upon my successors, heirs, assigns, and personal representatives.

I have read and understood this Non-Disclosure Policy. I understand that my service as a staff, volunteer or board member with LBFEUM is contingent upon my compliance with this policy. Even if my service as a staff, volunteer, or board member is terminated or ends, my obligations of confidence and non-disclosure continue forever.

PRINTED name of volunteer

SIGNATURE of volunteer

Date (mm/dd/year)

Repudiation of Gifts/Bequests Policy: (Signature Required)

Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) staff, volunteers, and board members shall not accept individual cash gifts, planned gifts, bequests, or non-financial gifts from an elderly friend of LBFEUM or serve as a trustee, executor, or agent for an estate of an elderly friend with whom they were not acquainted prior to their association with the organization.

I understand that as a staff, volunteer, or board member of LBFEUM I represent an organization whose chief concern is the welfare of the elderly friends it serves. I understand that some of these elderly, may on occasion desire to give a gift to me.

I hereby agree that I will refuse any and all gifts in kind with a value greater than \$35 in any given calendar year. I will also refuse all cash gifts of any amount which may otherwise be given to me by any elderly friend. I will not accept a bequest from an elderly friend or serve as a trustee, executor, or agent for the estate of an elderly friend with whom they were not acquainted prior to their association with the organization. I further agree that if, at the death of an elderly friend, I learn I have been named a beneficiary or to serve as a trustee, executor, or agent, I will promptly inform LBFEUM and disclaim the bequest or renounce the appointment, as applicable.

I have read and understood this Repudiation of Gifts/Bequests Policy. I hereby renounce and reject any and all benefits, interests, gifts, bequest, and annuities that do, may, or might accrue to me under instruments executed by any elderly friends with whom I was not acquainted prior to my association with the organization.

I understand that my service as a staff, volunteer, or board member with LBFEUM is contingent upon my compliance with this policy. I also understand if my service as a staff, volunteer, or board member is terminated or ends, my obligations under this Repudiation of Gifts/Bequests Policy continue indefinitely unless released in writing by action of the LBFEUM board.

PRINTED name of volunteer

SIGNATURE of volunteer

Date (mm/dd/year)

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ACKNOWLEDGEMENT OF POLICIES

I understand that my service as a volunteer with Little Brothers – Friends of the Elderly Upper Michigan Chapter (LBFEUM) is contingent upon my compliance with the above policies defined throughout the Policies Handbook. Should I breach any policy, it is grounds for disciplinary action or termination.

PRINTED name of volunteer

SIGNATURE of volunteer

Date (mm/dd/year)