

Blue Ridge Pride Center, Inc. Policy Manual

Consolidated Policies, Procedures, and Forms

Last Revised: February 1, 2021

This document consolidates our major policies, procedures, and forms into one document. Most are also available as separate documents. If you have questions or suggestions please direct them to the Executive Director or Board Vice President.

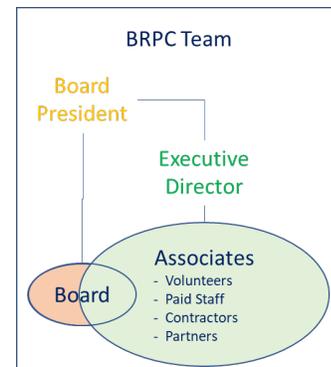
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Commonly Used Policy Definitions and Abbreviations

These are terms used throughout our policy manual.

- ❑ **BRPC:** The **Blue Ridge Pride Center, Inc.**, including its **Team Members**, programs, projects, and assets.
- ❑ **BRPC Team Members:** Includes all employees, volunteers, agents, and contractors acting on behalf of **BRPC**.
 - **Board vs Associates:** **Associates** are the **Team Members** that deliver on **BRPC's** mission and manage its resources. The Board is accountable for fiduciary oversight of **BRPC's** performance of its mission. It also oversees the performance of the **Executive Director**. A **Team Member** may serve as both an Associate and a member of the board. When they engage in board activities, they do so at the direction of the **Board President**. When they engage in staff activities, they do so at the direction of the **Executive Director**. A policy that applies to **BRPC Team Members** applies to both board members and associates.
- ❑ **Programs, Functions, and Projects:** Everything we do can be described as a program, function, or project.
 - **Program:** Delivers value to our constituents through a portfolio of activities and projects. While programs may be added or retired, they are generally considered a long-term commitment.
 - **Function:** Supports the ongoing operation of **BRPC** and its programs. Common 501c3 functions include Finance, Communications, Development, Volunteer Management, Systems, and Administration.
 - **Project:** Programs and Functions may include both ongoing activities, as well as discrete, time-bound projects. Some projects are so large that they require their own leadership position.
- ❑ **Senior Team Members / Associate Leadership Roles:** Leadership roles are generally defined in terms of a particular program, function, or project. They are commonly referred to as **Program, Project & Function Directors**.
- ❑ **Policy Scope:** **Associate Policies** are day-to-day operating policies that apply to any **Team Member** working in an **Associate** capacity. They do not cover **Board Members** acting in their board role. However, **Board Members** who act in an Associate capacity are subject to **Associate Policies**.
- ❑ **BRPC Constituents:** Includes all individuals and organizations who have a past, present, or targeted relationship with **BRPC**. These include clients, donors, **Team Members**, contractors, and alumni. They include organizations, groups, and individuals.
- ❑ **Information:** Many of our policies are designed to protect and preserve information. We distinguish between three types:
 - **Proprietary Information:** All information gathered and developed by **BRPC** that is not readily available for free and in a similar format from public sources. Such information is considered the property of **BRPC** and is not to be used, shared, or stored, except for **BRPC** purposes and by people authorized to use it.
 - **Personal Identifiers:** Includes information that can be used to identify, locate, or contact a person, such as name, personal phone, address, and email. Such information is not to be shared or used, except as needed to perform approved **BRPC** activities.
 - **Confidential Information:** Includes details generally considered private by constituents, such as financial and transaction information, medical history, physical condition, sexuality, or gender identity, family information; survey, interview, and questionnaire responses. Such information should never be shared or used except as expressly authorized or understood by the person the information pertains to. Whenever we ask for such information, we should be explicit about how it will be used.



Policies

The following pages contain master copies of our core policies and procedures. These are each available as separate PDF files. [NOTE: Changes to policies should be made in this Word document and converted to updated PDFs. The file name should include the date the policy is effective.]

Code of Ethics

Policy 1501

Status: In Force

Approved by BOD: January 2015

Purpose

Given its mission, **Blue Ridge Pride Center, Inc.** (the “Organization”) has adopted a code of ethics to guide its **Board Members, committee members** and **staff** in their conduct when acting on behalf of **BRPC**. The Code contains broad principles reflecting the types of behavior **BRPC** expects towards **constituents, donors, employees**, peers and the public.

This policy is not intended as a stand-alone policy. It does not embody the totality of **BRPC’s** ethical standards, nor does it answer every ethical question or issue that might arise. Rather, it is one element of a broader effort to create and maintain a quality organization that gives ethical conduct the highest priority. This Code will be reviewed periodically.

Board Members, committee members and staff should:

- Listen to our stakeholders and make all reasonable efforts to satisfy their needs and concerns within the scope of our mission, and to strive for excellence and innovation and demonstrate professional respect and responsiveness to **constituents, donors**, and others.
- Try to understand, respect, and support our **constituents** from other cultures, exemplified by the contributions of our **staff** and executive leadership, and to contribute to an organizational culture that respects the diverse, individual contributions of **staff** and leadership.
- Respect the confidentiality of sensitive information about **BRPC**, its **members, constituents, donors**, board, and **employees**.
- Comply with applicable federal, state, and local laws, regulations, and fiduciary responsibilities to create transparency in all our operations.
- For the **Board of Directors**, provide credible and effective oversight to **BRPC’s** work without personal bias.
- Not accept commissions, gifts, payments, loans, promises of future benefits or other items of value from anyone who has or may seek some benefit from **BRPC** in return, other than occasional gifts of nominal value that are in keeping with good business ethics.
- Abide by the governing documents and policies of **BRPC**.
- Be accountable for adhering to this Code of Ethics.
- Implement and follow a Conflict-of-Interest Policy.
- Implement and follow a Whistleblower Policy.
- Act always in accordance with the highest ethical standards and in the best interest of **BRPC**, its **members, constituents, donors**, and reputation.
- Openly and honestly tell the truth.
- Honor our commitments and promises to the best of our abilities.
- Appropriately acknowledge contributions from other individuals and organizations who help facilitate our goals.
- Not be deceptive in our fundraising activities.
- Advocate for all LGBT organizations - being respectful to everyone.
- Not lobby with the intent to influence individual candidates.

Compliance, Monitoring and Reporting

BRPC’s management is responsible for communicating this Code of Ethics to all **members** of the **Board of Directors**, standing committee **members**, as well as **staff, staff interns** and **staff volunteers** and for always ensuring its adherence.

Adopted by Board of Directors – January 2015.

Conflict of Interest

Policy 1502

Revised: January 31, 2021

Purpose

BRPC Team Members are expected to act in a manner that advances the interests of **BRPC** and safeguards its reputation and integrity. This especially applies to **Senior Team Members**. Their relationship with **BRPC** is based on the understanding that conflicts of interest do not exist or will not affect their decision-making ability.

This conflict-of-interest policy is designed to ensure the integrity of **Blue Ridge Pride Center, Inc. (BRPC)** and to protect its interests when entering into transactions and relationships that might benefit the private interest of a **Senior Team Member**.

Definitions

- ❑ **Senior Team Members** include members of the **Board of Directors**, the **Executive Director**, and **Directors of Programs, Functions, and Major Projects**.
- ❑ A **Conflict of Interest** is present when a **Senior Team Member's** stake in a transaction, decision, or relationship is such that it reduces the likelihood that the **Senior Team Member** can be counted on to act impartially and in the best interests of **BRPC**.
- ❑ An **Apparent Conflict of Interest** is present when a **Senior Team Member's** stake in a transaction, decision, or relationship is such that it invites public distrust in the ability of the **Senior Team Member** to act impartially and transparently.

Disclosure & Review

- ❑ All **Senior Team Members** must complete an **Annual Disclosure Document** listing potential conflicts of interest they may have in carrying out their responsibilities. This should disclose current or recent (prior twelve months) participation in, or affiliation with, any organization involved in a material relationship with **BRPC**. Examples include employment, volunteer services, or a close professional or personal relationship with someone who is part of such an organization.
- ❑ If, during the year, any real, perceived, or potential conflict of interest arise:
 - **Board Members** and the **Executive Director** will immediately inform the **Board President**. The **Board of Directors** will decide, by formal vote, whether a conflict of interest exists and what measures to take. The minutes of any meeting of the Board pursuant to this policy shall record reported conflicts of interest, discussion, and eventual decisions. Interested parties must absent themselves from discussion and may not vote.
 - Program, Function and Project **Directors** will immediately inform the **Executive Director**. The **Executive Director** may take a direct decision or submit the issue to the **Board President**. In either case, the **Executive Director** shall record reported conflicts of interest and decisions taken in their formal report to the Board.

Integrity of Action

All **Senior Team Members** must refrain from taking any action, or making any statement, intended to influence the conduct of **BRPC** and its **Team Members** in such a way as to:

- ❑ Confer a financial benefit to themselves, their immediate family members, or any organization in which they or their immediate family members have a significant interest.
- ❑ Deploy **BRPC** assets and relationships to the benefit of another organization, except where openly agreed to and consistent with **BRPC** interests.

Board Members will not vote on any decision where there is a real, perceived, or potential conflict of interest.

Violations

- ❑ Unauthorized participation in any activity prohibited by this Policy can result in immediate separation from **BRPC** and termination.

Examples

Some conflict-of-interest situations are easily identifiable, whereas others are more subtle. Some of the more common situations are set out below. This list is illustrative only and should not be regarded as all-inclusive:

- ❑ Accepting Payments, Gifts or Personal Services: No **Team Member** shall accept payment of any kind (including gifts, cash, discounts, concessions, services or other similar item or benefits) for services rendered as a representative of **BRPC**. This

includes payment for speaking engagements or for participation in workshops or similar activities, except where approved in advance by the **Executive Director** or **Board President**.

- ❑ **Gifts / Personal Services to Clients:** Clients are people and organizations who receive mentoring, counseling, coaching, training, or other support services – either individually or as part of a group. A **Team Member** may not give or accept gifts or personal favors of more than token or nominal value (not more than \$15) from any **client**. This includes meals and entertainment. A **Team Member** shall not buy goods or possessions for or from a **client** or sell anything to a **client**. **Team Members** shall not act under any power of attorney, or as an executor, or witness to any legal or financial transactions for a **client**.
- ❑ **Inside Information:** Inside 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 **BRPC**.
- ❑ **Competing with BRPC:** No **Team Member** shall prevent or hinder **BRPC** from lawfully competing with others or divert business or personnel from **BRPC**.

Forms

- ❑ Annual Conflict of Interest Disclosure Document

Document Retention

Policy 1503

Revised: January 31, 2021

Purpose

In accordance with the Sarbanes-Oxley Act, which makes it a crime to alter, cover up, falsify, or destroy any document with the intent of impeding or obstructing any official proceeding, this policy provides for the systematic review, retention and destruction of documents received or created by **BRPC** in connection with the transaction of organization business. This policy covers all records and documents, regardless of physical form, contains guidelines for how long certain documents should be kept and how records should be destroyed. The policy is designed to ensure compliance with federal and state laws and regulations, to eliminate accidental or innocent destruction of records and to facilitate **BRPC's** operations by promoting efficiency and freeing up valuable storage space.

Retention Policies

Physical Records

At least annually, physical document and files are transferred from active files to inactive storage and retention dates are noted on the files. Confidential files are clearly designated as such. Files in storage are placed in a fire resistant, secure, dry place. When Files are past retention requirements, documents shall be destroyed in a method that maintains confidentiality (i.e., shredding). Do not place in dumpsters.

Electronic Documents and Records

Electronic documents will be retained as if they were paper documents. Therefore, any electronic files, including records of donations made online, that fall into one of the document types on the above schedule will be maintained for the appropriate amount of time. If a user has sufficient reason to keep an email message, the message should be printed in hard copy and kept in the appropriate file or moved to an "archive" computer file folder.

BRPC's records will be stored in a safe, secure, and accessible manner. Documents and financial files that are essential to keeping **BRPC** operating in an emergency will be duplicated or backed up at least every week and maintained off site. Backup and recovery methods will be tested annually.

Document Destruction

BRPC's Executive Director is responsible for the ongoing process of identifying its records, which have met the required retention period and overseeing their destruction. Destruction of financial and personnel-related documents will be accomplished by shredding.

Legal Holds

Document destruction will be suspended immediately, upon any indication of an official investigation or when a lawsuit is filed or appears imminent. Destruction will be reinstated upon conclusion of the investigation.

Compliance

Failure on the part of **Team Members** to follow this policy can result in possible civil and criminal sanctions against **BRPC** and its **Team Members** and possible disciplinary action against responsible individuals. The **Executive Director** and **Treasurer** will periodically review these procedures with legal counsel or **BRPC's** certified public accountant to ensure that they follow new or revised regulations.

Information Sharing & Storage

To ensure that we can comply with our retention and discovery policies, we must maintain control of all information and communications.

- Email:** All **Senior Team Members** and people with ongoing administrative roles will use **BRPC** email accounts to send and receive communications.
- Documents:** All documents associated with **BRPC** plans, operations, and activities will be stored on **BRPC** virtual drives.

Retention Standards

All short term and long-term storage of administrative and financial records are to be provided in a safe, secure, and confidential manner. Depending upon the type of record, the appropriate length of time for retention complies with legal and funder requirements. The following table provides the minimum requirements.

Record Type	Retention Period
Corporate Records	
Annual Reports to Secretary of State/Attorney General	Permanent
Articles of Incorporation	Permanent
Board Meeting and Board Committee Minutes	Permanent
Board Policies/Resolutions	Permanent
By-laws	Permanent
Construction Documents	Permanent
Fixed Asset Records	Permanent
IRS Application for Tax-Exempt Status (Form 1023)	Permanent
IRS Determination Letter	Permanent
State Sales Tax Exemption Letter	Permanent
Contracts (after expiration)	7 years
Correspondence (general)	3 years
Accounting and Corporate Tax Records	
Annual Audits and Financial Statements	Permanent
Depreciation Schedules	Permanent
General Ledgers	Permanent
IRS 990 Tax Returns	Permanent
Business Expense Records	7 years
IRS 1099s	7 years
Journal Entries	7 years
Invoices	7 years
Sales Records	5 years
Petty Cash Vouchers	3 years
Cash Receipts	3 years
Credit Card Receipts	3 years
Bank Records	
Check Registers	Permanent
Bank Deposit Slips	7 years
Bank Statements and Reconciliation	7 years
Electronic Fund Transfer Documents	7 years

Record Type	Retention Period
Payroll and Employment Tax Records	
Payroll Registers	Permanent
State Unemployment Tax Records	Permanent
Earnings Records	7 years
Garnishment Records	7 years
Payroll Tax returns	7 years
W-2 Statements	7 years
Employee Records	
Employment and Termination Agreements	Permanent
Retirement and Pension Plan Documents	Permanent
Records Relating to Promotion, Demotion or Discharge	7 years after termination
Accident Reports and Worker's Compensation Records	5 years
Salary Schedules	5 years
Employment Applications	3 years
I-9 Forms	3 years after termination
Timecards	2 years
Donor Records and Acknowledgement Letters	7 years
Grant Applications and Contracts	5 years after completion
Legal, Insurance and Safety Records	
Appraisals	Permanent
Copyright Registrations	Permanent
Environmental Studies	Permanent
Insurance Policies	Permanent
Real Estate Documents	Permanent
Stock and Bond Records	Permanent
Trademark Registrations	Permanent
Leases	6 years after expiration
OSHA Documents	5 years
General Contracts	3 years after termination

Whistleblower Protection

Policy 1504

Revised: January 31, 2021

Purpose

Blue Ridge Pride Center, Inc. (BRPC) requires **Team Members** to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. **BRPC Team Members** must practice honesty and integrity in fulfilling their responsibilities and comply with all applicable laws and regulations.

Compliance Officer

BRPC's Compliance Officer is responsible for ensuring that all complaints about unethical or illegal conduct are investigated and resolved. The **Board President** will either serve as the **Compliance Officer** or designate a **Board Member** to do so.

Responsibility to Report Concerns

This Whistleblower Policy is intended to encourage and enable **Team Members** and other stakeholders to raise serious concerns internally so that **BRPC** can address and correct inappropriate conduct and actions. It is the responsibility of all **Team Members** to report concerns about violations of **BRPC's** code of ethics or suspected violations of law or regulations that govern **BRPC's** operations.

- ❑ **Open Door Policy:** **BRPC** has an open-door policy and suggests that **Team Members** share their questions, concerns, suggestions, or complaints with their supervisor. They are also invited to speak with the **Executive Director, Board President, or Compliance Officer**.
- ❑ **Required Reporting:** **Team Members** in positions of authority are required to report complaints or concerns about suspected ethical and legal violations in writing to the **BRPC's Compliance Officer**, who has the responsibility to investigate all reported complaints. **Team Members** with concerns or complaints may also submit their concerns in writing directly to their supervisor or the **Executive Director** or **BRPC's Compliance Officer**.

Protections

- ❑ **Confidentiality:** Violations or suspected violations may be submitted on a confidential basis by the complainant. Reports of violations or suspected violations will be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation.
- ❑ **No Retaliation:** It is contrary to the values of **BRPC** for anyone to retaliate against anyone who in good faith reports an ethics violation, or a suspected violation of law, such as a complaint of discrimination, or suspected fraud, or suspected violation of any regulation governing the operations of **BRPC**. A **Team Member** who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of employment.
- ❑ **Acting in Good Faith:** Anyone filing a written complaint concerning a violation or suspected violation must be acting in good faith and have reasonable grounds for believing the information disclosed indicates a violation. Any allegations that prove not to be substantiated and which prove to have been made maliciously or knowingly to be false will be viewed as a serious disciplinary offense.

Handling of Reported Violations

BRPC's Compliance Officer will:

- ❑ Notify the person who submitted a complaint and acknowledge receipt of the reported violation or suspected violation. All reports will be promptly investigated, and appropriate corrective action will be taken if warranted by the investigation.
- ❑ Advise the **Executive Director** and/or the **Board of Directors** of all complaints and their resolution.
- ❑ Immediately notify the **Treasurer** and **Board President** of any concerns or complaint regarding corporate accounting practices, internal controls or auditing and work with the **Treasurer** until the matter is resolved.

Communications & Information Sharing

Policy 1505

Revised: January 31, 2021

Purpose

To protect its mission and reputation, **BRPC** needs to retain control of its communications, branding, and information assets.

External Communications

- Media Relations:** All media contacts are to be handled by the **Communications Director**, **Executive Director**, **Board President**, or a designee they appoint.
- Review & Approval:** All press releases, communications or other promotional materials are to be approved by the **Communications Director**, **Executive Director**, or **Board President** prior to dissemination.
- Public Representation:** No **Team Member** shall use **BRPC** stationery or any title of **BRPC** or refer to **BRPC** or misidentify themselves as an authorized representative in connection with any matter as to which they are not authorized as a representative of **BRPC** and to express an opinion on its behalf.

Use of BRPC Name / Logo

The **BRPC** name and logo are copyrighted materials. Use of these materials is strictly prohibited without express consent from the **Communications Director**, **Executive Director**, or **Board President**.

Individuals and organizations given permission to use **BRPC's** name/logo in the production of approved publications and promotional materials will be provided a copy of our copyrighted name/logo. Use of the name and logo is restricted to approved publications and promotional materials and cannot be used for future publications and promotional materials without the express approval of the **Communications Director**, **Executive Director**, or **Board President**.

Email / Document-Sharing

To ensure that we can comply with our retention and discovery policies, we must maintain control of all information and communications.

- All **Senior Team Members** and people with ongoing administrative roles will use **BRPC** email accounts to send and receive both internal and external communications. This includes leaders of programs, functions, projects, and **Team Members**. It does not include occasional **Team Members**.
- Team Members** should share only one another's **BRPC** email addresses for **BRPC** activities. They should never give out other **Team Members'** personal emails without prior consent.
- BRPC Documents:** All documents and files associated with **BRPC** plans, operations, and activities must be stored on and shared through **BRPC** virtual drives.

These policies serve several critical purposes:

- Enables compliance with our information retention policy (all 501c3s are expected to have such a policy).
- Enables **BRPC** to comply with potential legal discovery requirements.
- Ensures that constituents have a durable email address to contact.
- Enables **BRPC Team Members** to differentiate between work-related and personal communications.
- Enables **BRPC Team Members** to share one another's work emails while protecting each other's privacy.

Social Media and the Internet

Our Social Media Guidelines

To understand our social media policies, it helps to understand their underlying rationale:

- Our Mission:**
- Our Standards of Practice:** In everything we do, we seek to:
 - Present a sharp, professional image.
 - Maintain a family-friendly environment.
 - Respect all copyrights.

- ❑ **What We Seek to Do:** Our goal is to support our local LGBTQ+ community through advocacy, education, celebration, and service. We therefore seek to use social media and the internet to:
 - Promote anything that is aligned with this overriding goal.
 - Promote our programs, events, projects, and resources.
 - Personify Blue Ridge Pride by sharing pictures of our team in action.
 - Share news and announcements relevant to our mission.
 - Offer daily affirmations – feel good quotes, local pictures, happy things, etc.
 - Support partner organizations and their events.
 - Share pictures and videos of past **BRPC** and community events (e.g., Throwback Thursdays).
- ❑ **What We Will Not Do:** It is against our policy to do any of the following:
 - Promote political candidates or parties.
 - Spread misinformation.
 - Share information confidential to our team, donors, and other constituents.
 - Shame, demean, threaten, or stereotype any individual, group, or group identity. (This includes groups and identities that we may not identify with.)

Social Media Policies for Team Members

- ❑ **Team Members Are Encouraged to:**
 - Add posts and events that comply with the guidelines above.
 - Tag other organizations when you mention them in a positive light.
 - Interact with your audience as much as you can: Like comments; Say “Thank you” to those who share or are helpful; Invite “Likes” to officially like our pages.
- ❑ **Team Members Should Not:** Because we value our reputation for quality, we ask colleagues:
 - Don’t share information without doing your research. Is the website valid? Is the information correct?
 - Don’t use low-quality pictures or videos or logos that are off brand.
 - Don’t be needy – don’t ask for shares/likes/etc.
 - Don’t write in ALL CAPS!
 - Don’t overuse hashtags. They are often used on Twitter but do not get much traction on Facebook. One or two, if any, should suffice.
- ❑ **Team Members Must Not:** When representing Blue Ridge Pride or interacting through Blue Ridge Pride social media channels, you must not:
 - Post or comment contrary to our guidelines above.
 - Comment personally through the Blue Ridge Pride account unless you are speaking on behalf of **BRPC** with the express support of the **Executive Director**, **Communications Director**, or **Board President**.
 - Share **Team Members’** personal contact information (e.g., personal email or phone).
 - Go negative, use a sarcastic tone, or act in a confrontational manner to anyone when you are presenting yourself as a representative of Blue Ridge Pride.
 - Communicate to or about individuals, except where supportive. [If you feel that we need to respond to someone’s post or comment critically, bring it to the attention of the **Communications Director**.
 - Use profane language, threats, racist/homophobic/transphobic/any-phobic language.
 - Critique anyone’s expression of their identity.
 - Share copyrighted material without proper credit and permission.
 - Share pictures or videos that are likely to be considered adult content.
- ❑ **When Team Members Should Seek Review:** The **Communications Director**, **Executive Director**, **Board President**, or one of their designees must review and approve the following content:
 - Editorials and opinion pieces
 - Policy endorsements or critiques

- Criticisms of individuals, organizations, events, or movements.

Personal Social Media

We hope that **Team Members** will use similar standards of practice in their own social media accounts. If a **Team Member** deviates from these standards, we ask that they make certain that their comments cannot in any way be construed to represent the views of **Blue Ridge Pride Center, Inc.**

Political Activities / Advocacy

- Team Members** 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 **BRPC**, **Team Members** participating do so as individuals and not as representatives of **BRPC**.
- Team Members** must not engage in political activities on behalf of **BRPC** unless expressly approved beforehand by the **Executive Director** or **Board President**.
- To avoid any inference of support or sponsorship by **BRPC**, a **Team Member** must never represent that their political donation, endorsement, or other political activity was made or engaged in with the approval, or on behalf, of **BRPC**.

Not Sure?

If you have something that you want to communicate, share, or post but aren't certain about compliance issues, please email it to communications@blueridgepride.org.

Confidentiality

Policy 1506

Revised: January 31, 2021

Purpose

Maintaining the confidentiality of all sensitive information regarding **BRPC**, its clients, **Team Members**, partners, and donors is of the utmost importance. **BRPC** recognizes that one of the most important aspects of working with at-risk populations is protecting sensitive information. **BRPC** and its **Team Members** are also obligated under federal and state law to protect certain confidential information. Therefore, **BRPC** has adopted the following policy which applies to all **BRPC Team Members**.

Definitions

- ❑ **BRPC Constituents:** Includes all individuals and organizations who have a past, present, or targeted relationship with **BRPC**. These include clients, donors, **Team Members**, contractors, and alumni. They include organizations, groups, and individuals.
- ❑ **Sensitive Information:** Many of our policies are designed to protect and preserve information. We distinguish between three types:
 - **Proprietary Information:** All information gathered and developed by **BRPC** that is not readily available for free and in a similar format from public resources.
 - **Personal Identifiers:** Information that can be used to identify, locate, or contact a person (e.g., name, phone, address, email).
 - **Confidential Information:** Details generally considered private by constituents (e.g., financial information, transaction details, medical history, sexuality, gender identity, family information; survey responses).

Access to and Use of Sensitive Information

- ❑ **All Sensitive Information:** **BRPC Team Members** may only be granted access to Sensitive Information as needed to conduct **BRPC** business. They may not download, save, use, share, or print Sensitive Information except where required to complete assigned activities. They may not retain Sensitive Information following their term of service to **BRPC**.
- ❑ **Proprietary Information** is considered the property of **BRPC** and is not to be used, shared, or stored, except for **BRPC** purposes. It should never be shared, even with partners, without the express approval of the **Executive Director**.
- ❑ **Personal Identifiers** are not to be shared or used, except as needed to perform approved **BRPC** activities. Such information should never be shared externally unless expressly authorized when collected.
- ❑ **Confidential Information** should never be shared or used except as expressly authorized or understood by the person the information pertains to. Confidential Information may not be disclosed without a signed release form from the constituent except for the following instances: medical emergencies that present an immediate threat; reporting abuse of people unable to fend for themselves; reporting a felony. In such cases, relevant information should be shared with an appropriate health care, social services, or law enforcement professional.

Confidentiality Agreement

Any **BRPC Team Members** likely to have access to sensitive information while working for **BRPC** must sign a Confidentiality Agreement. **Team Members** who have limited roles, such as booth volunteers at **BRPC** events do not need to sign a Confidentiality Agreement.

Examples

Some common situations are set out below. This list is illustrative only and should not be regarded as all-inclusive:

- ❑ **Team Members' Personal Contact Information** (email, phone, social media) should never be shared without their permission. These are personal identifiers.
- ❑ **Program Participants:** **Team Members** should never reveal who is participating in a **BRPC** program or service without authorization. Some people and organizations consider their mere participation in a project a matter of confidence.
- ❑ **Organization Addresses:** At-risk groups are often sensitive to sharing location information publicly. This poses a security risk. Never share or publish addresses (or other identifiers) without authorization.

- ❑ **Donor Information:** **BRPC Team Members** may NOT reveal donor identity to anyone without the express written permission of the individual being recognized. Contributor confidentiality does not extend to grant funders, sponsors, and other organizational bodies who contribute money to **BRPC**.
- ❑ **Inappropriate Use:** Don't assume that information gathered for one project or program can be used to promote another project or program. We want users to trust that we will not exploit the information they share for unrelated purposes. If in doubt, check with the **Executive Director** or the **Program Director** who collected the information.

Questions

Questions regarding constituent information should be directed to the **Executive Director**, or **Board President**.

Use of BRPC Assets

Policy 1508

Revised: January 31, 2021

BRPC Property

BRPC Team Members are responsible for any **BRPC** property issued to their care. This includes equipment, materials, files, keys, passwords or other written or electronic information. All **BRPC** property must be returned on or before a **Team Member's** last shift or day. Any losses or damage should be reported.

Equipment & Vehicles

- ❑ **BRPC**-owned or leased equipment and vehicles are to be used for **BRPC's** business purposes only. Equipment may not be borrowed or otherwise used for personal use without express approval by the **Executive Director**. **BRPC**-owned or leased vehicles may never be used for personal use or to transport other passengers.
- ❑ Any equipment, machines, tools, or vehicles which appear to be damaged, defective, or in need of repair should be reported to the **Team Member's** supervisor. Prompt reporting of damages, defects, and the need for repairs could prevent deterioration of equipment and possible injury to others. An individual supervisor can answer any questions about the **Team Member's** responsibility for maintenance and care of equipment or vehicles used during a **volunteer** assignment.

Mail Services

- ❑ The use of **BRPC** paid postage for personal correspondence is prohibited by Federal law.

Computer Usage

- ❑ **BRPC** may provide computers and Internet access to support its programs and to enable **volunteers** to perform their duties. Computers, e-mail, and Internet access should be used for business related purposes.
- ❑ For **BRPC** to maintain a professional image, it does not allow **Team Members** to view content that is considered lewd, indecent, pornographic, or offensive while using **BRPC** equipment and networks and while working on behalf of **BRPC**. Failure to comply with **BRPC's** computer usage policy will be considered grounds for termination.

Reimbursement of Expenses

Policy 1509

Revised: January 31, 2021

Team Members are eligible for reimbursement of pre-approved out-of-pocket expenses incurred while engaging in service on behalf of **BRPC**. Upon approval by the appropriate **Director (Executive, Program, Function, or Project)**, **Team Members** must track expenses and submit receipts for all out-of-pocket expenses for which they seek reimbursement.

Pre-Approval

Before making any purchases intended for reimbursement by **BRPC**, **Team Members** should obtain approval from the appropriate **Director**. Purchases made without advance approval may not be reimbursed. If the amount to be reimbursed is less than \$100, a verbal approval will be sufficient. If it is to be greater than \$100, the **Team Member** should submit an estimate using the **Reimbursement Request Form**.

Reimbursable Expenses

- Local Travel:** Reimbursement for travel by motor vehicle is based on mileage and the standard rate per mile at which **BRPC** reimburses drivers. Reimbursement for travel by public transportation is based on actual out-of-pocket expense which must be substantiated by receipts.
- Local Meals:** As a rule, **BRPC** does not reimburse for meals and food, except for approved out-of-town travel. Be sure to get pre-approval for such expenses.
- Out-of-Town Travel:** All expenses for out-of-town travel must be pre-approved by the **Executive Director**. This includes transportation, lodging, meals, and other incidentals.
- Operating Expenses:** If pre-approved, **Team Members** may submit expenses associated with programs, projects, and functions (e.g., postage, supplies, parking).
- Non-Reimbursed Expenses:** As a rule, **BRPC** does not reimburse for telephone calls, Wi-Fi or internet services, baggage services, valet services, laundry or cleaning services, club fees, in-room entertainment, movies, mini-bar charges, or other personal expenses.

Submitting Expenses

To receive reimbursement, **Team Members** should fill out and submit an **Expense Reimbursement Request Form**. It should be emailed to the appropriate **Director**.

Forms

- Expense Estimate and Reimbursement Request Form

Personal Safety & Health / Liability

Policy 1510

Revised: January 31, 2021

Purpose

BRPC is committed to providing a safe and healthy environment for our programs, projects, and events. To that end, it is our intent to provide a safe and secure environment for our **Team Members** and constituents.

Definitions

See Definitions and Abbreviations section

Threats / Violence

BRPC is committed to providing a safe work environment that is free of violence or the threat of violence. Threats, threatening behavior, or acts of violence against **Team Members**, visitors, or other individuals by anyone on **BRPC** property or at a **BRPC** event will not be tolerated. Anyone found threatening or committing violence on **BRPC** premises or at **BRPC** events will be escorted immediately from the premises. If they are a **BRPC Team Member**, they are subject to immediate termination.

Working with the public calls for **Team Members** to be courteous and supportive, often in challenging situations. However, **Team Members** are never expected to endure any form of abuse (whether verbal, physical or threatened) from anyone. **Team Members** are not expected to work in any environment they consider unsafe.

Accidents & Injuries

If anyone is injured at **BRPC**, or in connection with **BRPC** services and events, it is important to notify the relevant **Program Director** or **Supervisor** immediately and, as soon as possible, to complete and submit an **Incident Report**. **Incident Reports** should be filed with the relevant **Program Director** and copied to the **Executive Director**.

Drugs

BRPC does not tolerate the use, possession, purchase, sale, manufacture, distribution, transportation, or dispensation of illegal drugs in connection with any of its events and programs. **Team Members** found in violation of this policy will be subject to disciplinary action up to and including termination.

The legal use of prescribed drugs is permitted during **Team Members** service only if it does not impair a **Team Members'** ability to perform the essential functions of the **Team Members** position effectively and in a safe manner that does not endanger other individuals in the workplace. **Team Members** must advise their supervisor if they are taking any prescription or over-the-counter drug which could adversely affect safety or performance.

Alcohol

Alcohol use at **BRPC** events is allowed as permitted under the law and as permitted by **BRPC** for that event. When alcohol is served at a **BRPC**—sponsored event, **Team Members** who consume alcohol are expected to consume in a responsible and legally compliant manner. Anyone serving alcohol must have received ABC certification within the past three years and have provided a copy of their certificate to **BRPC**. **Team Members** may not serve alcohol if they have recently consumed it in any quantity.

Weapons

Possession or use of weapons, including but not limited to firearms, knives, or martial arts paraphernalia by **Team Members** or visitors on **BRPC** property or at **BRPC**- sponsored events is strictly prohibited.

Transportation

Team Members are not permitted to transport clients under any circumstances. No volunteer may operate a vehicle in performance of **BRPC** business without appropriate insurance and licenses.

Personal Property

BRPC is not responsible for lost or stolen personal property. **BRPC** will not reimburse a **BRPC Team Members** for any personal property.

Liability and Liability Coverage

BRPC's general liability coverage protects volunteer **Team Members**, with some limitations and exclusions, for covered injury or damage that results from activities or service that **Team Members** conduct or perform at **BRPC's** direction and within the scope of their duties for **BRPC**. **BRPC's** general liability coverage does not provide coverage to **Team Members** themselves for liabilities they may have incurred for their actions. In some instances, **Team Members** must sign a **Waiver and Release Agreement** absolving **BRPC** of liability when they voluntarily and knowingly subject themselves to certain risks while performing services on behalf of **BRPC**.

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

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

Extent of volunteer liability and covered organizations

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

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

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

- when the misconduct constitutes either a crime of violence (as defined in the United States Code) or an act of international terrorism for which the volunteer has been convicted in any court;
- when the misconduct constitutes a hate crime as defined in the United States Code;
- when the misconduct involves a sexual offense under state law for which the volunteer has been convicted in any court;
- when the misconduct involves a deed for which the volunteer has been found to have violated a federal or state civil rights law; or
- when the volunteer was under the influence of alcohol or any drug at the time of the misconduct.

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

Monitoring, Responding, Reporting

Complaints regarding violations of personal safety shall be investigated promptly, and when appropriate, corrective action will be taken to remedy the situation. Report any violation using an **Incident Report Form**. The incident report form should be given to the relevant **Program Director** and copied to the **Executive Director**.

Forms

- Accident / Incident Report Form
- Waiver and Release Agreement

Treatment of People

Policy 1511

Revised: January 31, 2021

Purpose

BRPC is committed to treating all people with respect and to ensuring an environment that is safe and welcoming to all.

Definitions

See Definitions & Abbreviations

Non-Discrimination

It is the policy of **BRPC** to provide services and to recruit, manage and develop **Team Members** without regard to race, color, religion, sex, sexual orientation, gender identity or expression, pregnancy, marital status, national origin, citizenship, veteran status, ancestry, age, physical or mental disability, medical condition, genetic characteristic, or any other consideration made unlawful by applicable laws. Such discrimination is not tolerated or condoned in the workplace.

Harassment

Harassment of **Team Members**, visitors, or clients in any form is strictly prohibited by **BRPC**. Anyone violating this policy is subject to immediate eviction, dismissal, or termination.

Sexual harassment is defined by the regulations of the Fair Employment and Housing Commission as unwanted sexual advances, or visual, verbal, or physical conduct of a sexual nature. Sexual harassment includes gender harassment and harassment based on pregnancy, childbirth, or related medical conditions, and includes sexual harassment of someone of the same gender as the harasser. This includes, but is not limited to, the following types of offensive behavior:

- Unwanted sexual advances;
- Offering employment benefits in exchange for sexual favors;
- Making or threatening reprisals after a negative response to sexual advances;
- Visual conduct, including leering, making sexual gestures, displaying of sexually suggestive objects or pictures, cartoons, or posters;
- Verbal conduct, including making or using derogatory comments, epithets, slurs, and jokes;
- Verbal sexual advances or propositions;
- Verbal abuse of a sexual nature, graphic verbal commentaries about an individual's body, sexually degrading words used to describe an individual, suggestive, or obscene letters, notes, or invitations;
- Physical conduct, including touching, assault, impeding or blocking movements.

Racial, ethnic, and other forms of prohibited harassment include, but are not limited to:

- Visual conduct, including displaying of derogatory objects or pictures, cartoons, or posters;
- Verbal conduct, including making or using derogatory comments, epithets, slurs, and jokes;

BRPC encourages Team Members to bring any incidents of harassment to the immediate attention of the Executive Director.

Sexual Conduct / Intimate Relationships

Clients

It is the policy of **BRPC** that no **Team Member** shall engage in sexual activity with any **BRPC** client with whom such a person has a direct ongoing organizational relationship. This applies regardless of age. Sexual conduct is defined here as any oral, anal, genital, or body contact which, no matter how subtle, would be understood as sexual by a reasonable objective outsider.

Team Members are also prohibited from engaging in sexual activities with clients' relatives or other individuals with whom clients maintain a close personal relationship when there is a risk of exploitation or potential harm to the client. Sexual activity or sexual contact with clients' relatives or other individuals with whom clients maintain a personal relationship has the potential to be harmful to the client and may make it difficult for the **Team Member** and the client to maintain appropriate boundaries.

Subordinates

BRPC encourages friendly relations between **Team Members**. However, it is important to remain aware of appropriate professional boundaries. **BRPC** discourages relationships of a romantic or sexual nature between supervisors and those they supervise. Any questions of conflict of interest, discrimination, or harassment may be grounds for immediate dismissal.

Reporting & Responding

BRPC will take all reasonable steps to prevent harassment and unlawful discrimination from occurring and will take immediate and appropriate action when **BRPC** knows that unlawful harassment has occurred. **Team Members** are expected to follow the same policies and procedures as employees regarding discrimination and unlawful harassment complaints. **BRPC** considers any harassing conduct to be a major offense which can result in disciplinary action for the offender, up to and including discharge.

- Complaints and concerns should be reported to the **Director of Volunteer Programs**, the appropriate **Program Director**, or to the **Executive Director** and recorded using an Incident Report.
- Anyone making a complaint will not be harassed or retaliated against for filing a complaint.
- The matter will be immediately and thoroughly investigated, and confidentiality will be maintained to the extent possible.
- After reviewing the evidence, a determination will be made concerning whether reasonable grounds exist to believe that a violation has occurred.
- Employees and **Team Members** are obligated to cooperate fully with investigations.

*If you have been harassed by a co-**Team Members**, supervisor, agent, vendor, or community member, or if you believe that another **employee** has been harassed, you have a duty to promptly report the facts of the incident or incidents, and names of the individuals involved to _____.*

BRPC will take action to deter any future harassment. the persons involved will be advised of the disciplinary determination/s and results of the investigation if appropriate. In addition, disciplinary action will be taken against any employee who attempts to discourage or prevent another employee from bringing harassment to the attention of management.

BRPC wants to assure all its employees that measures will be undertaken to protect those who complain about harassment from any further acts of harassment, coercion, or intimidation, and from retaliation due to their reporting an incident or participating in an investigation or proceeding concerning the alleged harassment.

Responsibility for ensuring compliance with, and continued implementation of, this policy rests with the **Executive Director**. The **Executive Director** will assure that all client participants, **Team Members**, and any other service providers associated with **BRPC** share in this responsibility to maintain an environment free from sexual harassment.

Grievance & Disciplinary Procedures

Policy 1512

Revised: January 31, 2021

Purpose

Team Member grievances are of great concern to **BRPC**, regardless of whether the problem is large or small. To provide prompt and efficient evaluation of, and response to grievances, **BRPC** has established a procedure for addressing grievances.

Definitions

- ❑ **Grievance:** Under this policy, a grievance is defined as any event, condition, rule, or practice which the **Team Member** believes violates their civil rights, treats him or her unfairly, or causes him or her any degree of unpleasantness or unhappiness on the job. A grievance may also deal with an attitude, or an opinion or statement held by a **Team Members** member or fellow **Team Member**.

Responding to Grievances

It is **BRPC's** policy to consider all opinions and points of view. There will be no discrimination against or toward anyone for their part in presenting a grievance. All grievances are handled confidentially.

When issues arise, every effort should be made to solve problems cooperatively and informally before presenting them in writing as a formal grievance. If a **Team Member** is not satisfied with informal resolution, they should submit a formal grievance in writing.

- ❑ A grievance should be made within 1 week of the incident and will be addressed by **BRPC** within 10 business days of receipt.
- ❑ **Team Members** will not be subjected to coercion, discrimination, reprisal, or unreasonable interruption of services for voicing complaints or recommending changes. All grievances, and the discussions surrounding them, will be treated as confidential.
- ❑ All submitted grievances must be reported to the **Executive Director** and to the **Board President**, even if resolved without the involvement of the **Executive Director**.
- ❑ All formal avenues for handling of grievances will be fully documented and the **Team Member's** wishes will be considered in the determination of appropriate steps and actions.

Disciplinary Procedures

Except for situations that call for immediate discharge (see below), **BRPC** prefers to pursue disciplinary action using **progressive, corrective discipline**.

Progressive Discipline

The intent of progressive, corrective discipline is to give those who engage in conduct detrimental to themselves and/or others an opportunity to learn from the situation, to correct the behavior, and prevent its recurrence. The steps that could be involved in the progressive, corrective discipline procedure for non-major incidents are as follows:

First Offense	<ul style="list-style-type: none"> • A verbal warning will be issued. • Documentation of the verbal warning will be forwarded to the Director of Team Member Programs and will be noted in the Team Member's permanent file.
Second Offense	<ul style="list-style-type: none"> • A first written warning will be issued. • A meeting will be held with the Team Member and his/her immediate supervisor. • Documentation of the first written warning will be forwarded to the Executive Director to be placed in the Team Member's file. • Suspension may follow for a set length of time determined by the Team Member coordinator.
Third Offense (or Serious Infraction)	<ul style="list-style-type: none"> • Dismissal from the Team Member program. • Documentation of Team Member dismissal placed in Team Member's file. Team Member is then retired from service. • This step will be taken if all other steps have failed, or if the situation is serious enough to warrant immediate dismissal under BRPC Policies.

NOTE: A **Team Member** has the right to add documentation of his/her interpretation of any incident for which he/she is accused of a policy violation to his/her record.

Disciplinary action under the progressive, corrective discipline procedures shall not involve any prior incident(s) of misconduct occurring more than one year prior to the incident giving rise to the disciplinary action. The **Executive Director** may decide not to proceed to the next level of discipline or may decide that the incident warrants action beyond that of the next level of discipline.

Immediate Discharge / Eviction

The following are grounds for immediate eviction and/or discharge from **BRPC** premises, events, and programs.

- Inappropriate relationship with a **client**;
- Physical harm, fighting, or personal threats – with or without weapons;
- Sabotage, theft, destruction, or misuse of property belonging to **BRPC**, a **Team Member**, guest, or constituent;
- Unauthorized use of records or other confidential information;
- Engaging in malfeasance or public conduct detrimental to **BRPC**;
- Use of alcohol or controlled substances within the context of a center program or event (except where explicitly permitted);

All such incidents must be reported to the **Executive Director**. Once someone is evicted or discharged, only the **Executive Director** can approve re-entry / re-instatement.

Volunteer Screening and Criminal Background Checks

Policy 1513

Revised: January 31, 2021

Purpose

BRPC wants to ensure the safety of vulnerable clients (e.g., children, elderly) and to preserve its public trust and reputation. It reserves the right to perform background checks on any **Team Member** who holds such positions of trust or where it is required by law.

When to Conduct Background Checks

- Criminal history record checks will be conducted for all applicants for positions that require substantial direct contact with individuals considered vulnerable by **BRPC** and where required to comply with laws and regulations.
- Criminal history record checks may be conducted for roles that involve substantial public representation of **BRPC** or trust with financial and personal data.

Consequences

- Individuals are permanently disqualified from holding positions that require substantial contact with any vulnerable individuals if they have a history of any violent or sexually exploitive behavior.
- Individuals are permanently disqualified from holding positions that require substantial contact with children if their criminal records include any of the following: history of sexual abuse of children; conviction for any crime in which children were involved.
- Other than stated above, a conviction for a criminal offense will not automatically disqualify an applicant for a position with **BRPC**. Applicants' criminal history records will be evaluated in the context of the specific position for which the application is submitted.

Procedures

- If requested, applicants for employment or volunteer service with **BRPC** must sign an **Authorization Statement** permitting **BRPC** to initiate criminal history record checks required by this policy. If we take adverse action on the basis, in whole or in part, of information in that report, they will be provided beforehand a copy of that report, the name, address, and telephone number of the consumer reporting agency, and a summary of their rights under the FCRA.

*BRPC will obtain record checks from _____ . _____ can be contacted by mail at _____ ;
phone at _____ ; or by website at _____ .*

Forms

- Authorization to Conduct Criminal Background Check
- Authorization to Conduct Credit and Employment History Check

Forms

The following pages contain master copies of our commonly used forms. These are each available as separate PDF files. [NOTE: Changes to forms should be made in this Word document and converted to updated PDFs. The file name should include the date the form is effective.]

Volunteer Agreement and Release Form

Revised: January 31, 2021

Personal & Emergency Contact Information

Legal Name of Volunteer			
Phone		Email	
Home Address			
Emergency Contact		Relationship	
Phone		Email	

Liability Waiver and Release Agreement

Initials: _____

On behalf of myself and my estate, I hereby waive any right of recovery and I release the **Blue Ridge Pride Center, Inc. (BRPC)**, their officers, officials, employees, and agents, from liability related to myself, arising from any and all injury to persons and damage to property. Furthermore, I agree and undertake to indemnify, hold harmless and defend **BRPC** from and against all claims, damages, actions, liability, and expenses. These expenses include attorney's fees and other professional fees in connection with bodily injury including death, personal injury and/or damage to property arising from or out of my activities and participation in volunteer services associated with **BRPC**.

I further acknowledge and agree that **BRPC** does not assume any responsibility for my personal property. I will not hold **BRPC** liable for any loss or damage to same.

Authorization to Use Photographs and/or Audio-Visual Material

Initials: _____

I authorize **BRPC** to use, reproduce, and/or publish photographs and/or video that may pertain to me, including my image, likeness and/or voice, without compensation. I understand that this material may be used in various publications, public affairs releases, Internet Web pages, recruitment materials, broadcast public service advertising, or for other related endeavors.

This authorization is continuous and may only be withdrawn by my specific rescission of this authorization in writing to the **Executive Director**.

Confidentiality (not required for event volunteers)

Initials: _____

I understand that in the course of my work for **BRPC**, I may learn something about individuals that is personal and confidential. These individuals include clients, visitors, volunteers, staff, and contractors. Examples of personal information include medical conditions and treatments, finances, living arrangements, employment, sexual orientation, gender identity, and personal contact information. I will not disclose information of a personal nature to any person or for any purpose not authorized by **BRPC**, without specific consent of the individual to whom such information pertains.

I also understand that, in the course of my service, I may learn certain facts about **BRPC** that are considered proprietary. Examples include mailing lists, financial reports, strategic plans, fundraising plans, and program documents. I agree not to use or share information that is proprietary to **BRPC**, except as authorized by **BRPC**. I further agree not to keep it for personal use.

Name (please print)

Signature (if 18 years or older) Date

Name of Parent or Legal Guardian (if under 18 years; please print)

Signature of Parent or Legal Guardian (if under 18 years) Date

Reimbursement Estimate / Request Form

Revised: January 31, 2021

- Pre-Approval:** All reimbursable out-of-pocket expenses require pre-approval by a Program, Project, or Executive Director. If reimbursements associated with an activity, trip or event are expected to be over \$200, an estimate should be submitted ahead of time using this form. In all other cases, a verbal approval is sufficient.
- Submission:** Please submit this form by email, mail, or in-person.
 - Email: Send to the governing Program, Project, or **Executive Director**. (executivedirector@blueridgepride.org. Send a copy to Finance@BlueRidgePride.org.
 - Mail: Blue Ridge Pride - Reimbursements | PO Box 2044 | Asheville NC 28802
 - In Person: Deliver to the governing Program, Project, or **Executive Director**.

Requestor Name		
Program / Project / Event		
Date		
Type of Submission	<input type="checkbox"/> Estimate	<input type="checkbox"/> Reimbursement
Payable To (Legal Name)		
Mailing Address		
Email		
Phone		

Expense	Estimate	Actual
Round-Trip Miles * \$0.50*		
TOTAL		

* The IRS allowance for driving for charities is \$0.14 per mile. We have adjusted our rate to be closer to the rate used by businesses.

Approval

Name		Title	
Signature		Date	

Annual Conflict of Interest Disclosure Form

Revised: January 31, 2021

Blue Ridge Pride Center, Inc. follows a conflict-of-interest policy designed to foster public confidence in our integrity and to protect our interest when we enter transactions or arrangements that might benefit a member of our team in a position of authority.

Part I. Acknowledgment of Receipt

I hereby acknowledge that I have received a copy of the conflict-of-interest policy of **Blue Ridge Pride Center, Inc.**, have read and understood it, and agree to comply with its terms.

Signature

Date

Printed Name

Part II. Disclosure of Financial Interests

We are required annually to file Form 990 with the Internal Revenue Service, and the form we file is available to the public. To complete Form 990 fully and accurately, we need each officer, **Director**, and key **employee** to disclose the information requested in this Part II.

A "conflict of interest," for purposes of Form 990, arises when a person in a position of authority over an organization, such as an **Officer, Director, Program Leader, or Key Employee**, may benefit financially from a decision he or she could make in such capacity, including indirect benefits such as to **family members** or businesses with which the person is closely associated.

Please check ONE of the following:

- My interests and relationships have not changed since my last disclosure of interests. [Proceed to signature block below. Do not complete the tables.] **OR**
- I hereby disclose or update my interests and relationships that could give rise to a conflict of interest: [Complete the table below. Use additional pages as needed.]

Family Relationships	Names of those presenting a potential conflict of interest
Include spouse/domestic partner, living ancestors, brothers, and sisters (whether whole or half-blood), children (whether natural or adopted), grandchildren, great grand-children, and spouses/ domestic partners of brothers, sisters, children, grandchildren, and great grandchildren	

Type of interest	Description of interest that could lead to a conflict of interest
Transactions or arrangements with the Organization	
Transactions or affiliations with other nonprofit organizations	
Substantial business or investment holdings	
Transactions or affiliations with businesses not listed above	

I am not aware of any financial interest involving me or a **family** member that could present a conflict of interest that I have not disclosed either above or in a previous disclosure statement.

Signature

Date

Printed Name

Accident / Incident Report Form

Revised: January 31, 2021

This form is to be completed for all accidents incidents.

INSTRUCTIONS: All accidents/incidents (**staff, youth, visitor**, etc.) require Sections I and II of the Accident/Incident Report to be completed by the injured person. If unable to do so, the person supervising the activity is to complete the accident report. In all cases, the supervisor of the activity is to complete Section III, review the report for completeness and accuracy, sign and forward to the **Executive Director** within 24 hours of the accident/incident.

SECTION I: PLEASE PRINT OR TYPE ALL INFORMATION FOR INJURED PERSON INVOLVED WITH INCIDENT				
Name:		Location Where Incident Occurred	Reason for Being at Location	
Home Address:				
Telephone Number:		Age:	Date of Birth:	
<input type="checkbox"/> Employee <input type="checkbox"/> Youth <input type="checkbox"/> Volunteer				
SECTION II ACCIDENT DATA				
NATURE OF INCIDENT:	<input type="checkbox"/>	Accident/Injury	<input type="checkbox"/>	Theft/Burglary
	<input type="checkbox"/>	Physical Altercation	<input type="checkbox"/>	Verbal Confrontation
	<input type="checkbox"/>	Property Damage	<input type="checkbox"/>	Other
DATE OF Accident /Incident:		TIME of Accident /Incident:		
Accident /Incident occurred at:				
Briefly explain what happened: (if an injury, (1) explain activities occurring when injury or illness occurred, (2) what happened to cause this injury or illness (3) what was the injury or illness (i.e., state the part of body affected and how it was affected)				
What action was taken: Check <u>all</u> actions taken. If more than one, indicate which occurred 1st, 2nd, etc.				
<input type="checkbox"/>	First Aid – administered by			
<input type="checkbox"/>	Sent to Physician (Name of Physician)			
<input type="checkbox"/>	Sent to Hospital (Name of Hospital)			
<input type="checkbox"/>	Sent Home			
<input type="checkbox"/>	Continued Activity (no action taken)			
Facilitator/Staff:		Name of Witness (if applicable) _____	Phone:	
Person Completing the Report			Date:	
Reviewed by Program Director			Date:	

SECTION III SUPERVISOR/FACILITATOR REPORT ON THE ACCIDENT/INCIDENT

What action has been taken to prevent such an accident/incident from recurring? Include specific details on how it was mediated, how the incident can be avoided in the future.

Supervisor/Facilitator's Account of Incident which supplements and/or clarifies information provided by injured party: (if an injury (1) explains activities occurring when injury or event occurred and, (2) what happened to cause this injury or illness (3) what was the injury or illness (i.e., state the part of body affected and how it was affected)

Section III Completed by:

Signature Date

SECTION IV- FOR BRPC OFFICE - DO NOT WRITE BELOW THIS LINE: INVESTIGATION/REVIEW

Investigation Comments:

Required Action:

Section IV Completed by: _____

Signature Date

Please send completed form to: [Executive Director](#) – [mail, email, fax information]

Appendices

Procedures & Responsibilities for Maintaining Policies

Overview

The Executive Director is accountable for overseeing the maintenance of all policies and procedures. They should advise the Board of any proposed revisions but need not seek formal board approval. The board, however, has the right (and responsibility) to rescind policy changes or to demand revisions. The Board has ultimate authority over and accountability for our policies.

Procedures

- Revisions
 - All core policies, procedures, and forms should be maintained in this consolidated Word Document.
 - The board should be notified (via the President and Vice President) of any substantive changes. However, their approval is not required for a policy or form to be revised.
- Each revision should be posted and distributed as a PDF.
- Policies and forms should also be stored as separate PDFs.

Responsibilities

- Executive Director:
 - Maintain policies, procedures & forms.
 - Advise board (via Board President & Vice President) and organization of changes.
 - Ensure that policies and forms are readily available.
- Board Vice President:
 - Oversee board review (as considered appropriate) of policies and forms
 - Ensure board compliance with policies
 - Manage collection and filing of forms from board members.

Tips

- Be sure to revise the date for a specific policy at the top of the policy.
- Summarize revisions in the Revision History (Appendix).
- Care should be taken to update the Last Revised date on the front page and in the footer.
 - To do so, right-click on the date field and select "Update field".
- To update the table of contents, hover on it then right-click and select update.

Revision History

February 1, 2021

- Consolidate policies issued.
- Policy 1501, previously approved by Board (in 2015) was left unchanged.
- Policies 1502, 1503, and 1503, previously approved by Board (in 2015) were revised.
- Policies 1505 through 1513 are new policies.