



# Volunteer Handbook 2022



Welcome to The Trustees! We're delighted to have you on board and look forward to working with you as we continue our remarkable record of leadership and achievement in the field of conservation. We are committed to accomplishing our goals through organization-wide best practices, both in our individual and collective work. We value your contribution to this shared vision.

The Trustees has become renowned through the help and hard work of many dedicated employees, volunteers, trustees, and members over the years. They have worked together to create an organization that has become an employer and conservation organization of choice. This handbook has been compiled to help you better understand the way that we work. It is also to help you become familiar with our policies and understand our expectations. I encourage you to use this handbook as a valuable resource for understanding our organization and making your experience here more meaningful and effective.

We encourage the free exchange of ideas from every employee within The Trustees. If you have any suggestions or ideas that you feel would benefit the organization, we encourage you to tell your supervisor or Human Resources. We are always looking for suggestions that improve methods, procedures, and working conditions; reduce costs or errors; and benefit the organization and its employees.

We also encourage you to share your concerns, seek information, provide input, and resolve problems/issues through your immediate supervisor, and, as appropriate, consult with any member of management toward those ends. Your supervisor is encouraged to seek your input, listen to your concerns, and seek resolution of any problems or issues that you might have.

We are dedicated to creating an environment that will attract and retain the most talented and capable individuals from a wide range of backgrounds and disciplines. We strongly believe in providing you with an atmosphere of mutual support, professional challenge, acknowledgment of effort and achievement, and individual respect. We believe that a fundamental part of the success of The Trustees is ensuring that civility and mutual respect is an integral part of our culture.

To that end, we ask that you commit to an environment that respects and supports individuals consistent with the standards by which you wish to be respected and supported.

Congratulations and welcome to The Trustees!

*Bob*

Bob Bowers,  
Director/Volunteer Services

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## INTRODUCTION

The Trustees of Reservations (“The Trustees”) Volunteer Handbook is a guide to basic volunteer policies, practices, and benefits. A thorough familiarity with its contents can be helpful in many matters that relate to volunteering with The Trustees. Volunteers are expected to take time to read this Volunteer Handbook carefully and refer to it for future reference. *For the purposes of efficiency throughout this handbook, the term ‘volunteer’ refers to all unpaid staff-volunteers, interns, board members and skills-based volunteers.*

The information in this volunteer handbook is not intended to cover every circumstance that may arise but is meant to outline the guidelines that are used for volunteer-related issues. As such, the information in this Volunteer Handbook is only a summary of and general guide to The Trustees’ policies and practices. Because no two volunteer situations are ever exactly alike, the policies described in the Volunteer Handbook must have some flexibility. The Trustees intends to treat you fairly. Therefore, The Trustees may modify implementation of the policies summarized here when The Trustees determines that circumstances warrant individualized consideration.

The policies, practices, and benefits summarized in this volunteer handbook have been adopted voluntarily by The Trustees and do not create any contractual rights, promises, or obligations of any kind with respect to the terms or conditions of volunteering between you and The Trustees. While The Trustees values you and looks forward to continuing a mutually satisfactory volunteer relationship with you, neither you nor the Trustees has entered into any contract of employment, express or implied, and the employment relationship between the Trustees and you remain “at-will.” That is, either you or The Trustees may terminate the relationship at any time, with or without notice and for any reason or no reason.

With the exception of the “at-will” volunteer policy, The Trustees’ policies, guidelines, and benefits are revised from time to time to keep up with changes in the law and current practices. The Trustees’ administrative officers reserve the right to interpret, revise, supplement, change, or rescind the contents of this volunteer handbook at any time as they deem appropriate, in their sole and absolute discretion, without prior notice to you. The Trustees will endeavor to reissue policies as they are revised electronically. Should you have any doubt about whether a policy is current, please check with the Volunteer Department.

The Volunteer Department, along with your supervisor, is primarily responsible for answering any questions regarding policies that affect volunteering with The Trustees. The Volunteer Department is available to provide further information and guidance on any of the topics described in this Volunteer Handbook.

The policies and practices contained within this Volunteer Handbook supersede any policies or practices or volunteer handbooks previously issued by The Trustees, excluding “summary plan descriptions.” Separate summary plan descriptions may exist that describe the benefits offered by The Trustees in greater detail than they are described in this Volunteer Handbook. If there is any inconsistency between the descriptions contained in this Volunteer Handbook and The Trustees’ formal insurance plans or contracts, such plans, or contracts control. Should you have a question about the nature and extent of any plan benefits, please refer to such documents.

Directors, managers, and supervisors do not have the authority to alter any of the policies in this Volunteer Handbook, to make any other commitments or promises to you, or to assure you of any benefit or terms and conditions of volunteering unless such commitments are made in writing and signed by Volunteer Services.

## **FAQs**

While It's important to spend some time going through the following pages, here are some frequently asked questions that should help get you started.

### **What is the Mission of Volunteer Services?**

Volunteers are at the heart of The Trustees – communities of individuals, organizations and companies committed to preserving and protecting the places we love for all to enjoy. Volunteerism has been a cornerstone of The Trustees since 1891 in conserving land for people and continues to play a role in shaping its future.

### **Who are The Trustees?**

We are a diverse community of people who want to protect the places we love or simply like to be outdoors. Together with our neighbors we preserve the distinct character of our communities and inspire a commitment to special places across the commonwealth. Our passion is to share with everyone the irreplaceable landscapes and landmarks that we care for – as we know how valuable they are to our everyday life.

### **What is my role as a volunteer?**

As a volunteer, you are a valued member of our Trustees team and part of our conservation community as well as a representative of The Trustees. You'll have opportunities to explain who we are and what we do while participating in various projects and events.

### **What do volunteers do?**

Volunteers, along with our neighbors, protect the distinct character of our communities and inspire a commitment to our special places. Our passion is to share with everyone the irreplaceable natural and cultural treasures we care for. Volunteers participate in stewardship and agricultural projects, skill-based projects, coastal conservation, and citizen science monitoring, and with events and programs across our properties.

### **Okay, why volunteer with The Trustees?**

As the oldest land conservation non-profit in the country, we know a thing or two about the special places in Massachusetts. You'll work together with some of the greatest people ever to conserve land and have fun doing it! Whether you are looking to put your green thumb to work, to learn how farms run or possibly to get inside some of the coolest cultural sites in New England . . . we have something for you.

### **I'm not quite sure what I want to do . . . how do I start?**

First thing: Register to be a volunteer. Next step: Find your opportunity! You can search by keyword, schedule type, location, distance, or calendar.

### **Why do I need a profile?**

A lot of administration goes on behind the scenes of every volunteer opportunity. In order to coordinate and support the volunteer programs, it's best to know who we are working with so we may tailor our offerings to keep our volunteers engaged. A profile helps us do exactly that.

### **How else can I get involved?**

Join our Volunteer Facebook Community Group. Or become a member to experience all of what The Trustees have to offer! Already a member? Become a donor. Already a donor? THANK YOU!

### **I'm having some trouble, what can I do?**

Contact us! Feel free to reach out to Volunteer Services at [volunteer@thetrustees.org](mailto:volunteer@thetrustees.org)

## **GENERAL VOLUNTEER POLICIES**

### **A. MISSION**

#### **Who We Are**

We are more than 100,000 people like you who want to protect the places we love, or simply like to be outdoors. Together with our neighbors, we protect the distinct character of our communities and inspire a commitment to our special places. Our passion is to share with everyone the irreplaceable natural and cultural treasures we care for.

#### **What We Are Up Against**

Through more than 100 years of hard work and high standards, The Trustees have built a sterling reputation and a stunning physical legacy. Today, the places we care about are going fast, and the forces undermining them, including climate change, are moving faster. We need to tap the wellspring of people's joy — in their communities, their heritage, and the natural world — and mobilize a whole new generation to care.

#### **What We Protect and Why**

We enjoy and care for over 100 special places — nearly 25,000 acres — all around Massachusetts. And we are actively building an extended family of friends and neighbors across the state that can help in their different ways.

#### **What We Do**

Conservation, stewardship, and people are at the heart of our mission.

#### ***Conservation — Saving the Best of the Massachusetts Landscape***

We practice conservation through:

- outreach and assistance to landowners interested in protecting their land in perpetuity
- collaborative land protection planning with other nonprofits and government agencies
- legislative advocacy
- placement of conservation restrictions on private land, both independent of and integral to existing reservations
- acquisition of parcels of land that buffer reservations
- acquisition of properties that become new reservations in our statewide system

#### ***Stewardship — Caring for Scenic, Historic, and Ecological Resources***

Our principles of stewardship include a commitment to:

- preserving and maintaining features in the landscape that contribute to a reservation's scenic value
- research, preservation, exhibition, and interpretation of historic buildings, structures, landscape features, and fine and decorative arts
- inventory, monitoring, and research; habitat conservation, management (including rare species protection) and restoration of natural resources
- comprehensive management planning that includes identifying natural and cultural resources to be protected and determining compatible forms of public access and use

#### ***People — Sharing Special Places***

Linking people with the special places we protect involves:

- providing various forms and levels of public access
- maintaining a high-quality experience for a diverse group of visitors
- offering a variety of recreational opportunities, from bird watching and hiking to cross-country skiing and paddling
- connecting people to the landscape with educational programs and special events

## **B. EQUAL EMPLOYMENT/VOLUNTEER OPPORTUNITY**

To provide equal employment, volunteer, and advancement opportunities to all individuals, employment- and volunteer- related decisions at The Trustees are based on merit, qualifications, and skills.

The Trustees is committed to a policy of non-discrimination and equal employment opportunity for all employees and qualified applicants without regard to race, color, religion, sex, pregnancy, sexual orientation, gender identity, national origin, ancestry, age, military service, application for military service, veteran status, physical or mental disability, genetic information, or any other status protected by applicable law. The Trustees makes reasonable accommodations for qualified individuals with known disabilities, in accordance with applicable law.

This commitment is evident in all aspects of The Trustees' employment & volunteer practices and policies, including recruiting, hiring, job assignment, promotion, compensation, discipline, termination, and access to benefits and training.

### **At-Will Volunteering**

Volunteering with The Trustees is voluntarily entered, and you may terminate your volunteering at-will at any time, with or without notice and for any reason or no reason. Similarly, The Trustees may terminate the at-will volunteer relationship of any volunteer at any time, with or without notice and for any reason or no reason

### **Reference Checks**

While references are not requested of all volunteer applicants, references may be requested for certain internship positions. These checks enable The Trustees to verify the information that you provide on your internship application.

### **Background Checks**

It is the policy of The Trustees to conduct background checks on certain volunteers due to the nature of such volunteers' positions. The Trustees will conduct pre-volunteering and periodic criminal background checks as well as sexual offender checks on all volunteers who interact with children or unsupervised minors as a part of their volunteer role or are responsible for children as an essential function of their position. The Trustees will conduct pre-volunteering and periodic checks of driving records of all volunteers who drive Trustees' vehicles as an essential function of their jobs. In addition, all volunteers who are subject to periodic checks of their driving records are required to report all incidents that would affect their driving record to their supervisor or Human Resources within a reasonable time of any such incident. The Trustees reserves the right to conduct an immediate check of volunteer driving records following a moving violation while operating a Trustees vehicle.

For those positions that require background checks (as described above), volunteering with The Trustees is contingent upon receipt of a satisfactory background check. All information related to an individual's background check is kept strictly confidential, in a file maintained separately from the individual's personnel file.

Please see the Criminal Background Check Policy (Appendix A) for more information.

## **C. VOLUNTEER CLASSIFICATIONS**

### **Volunteers**

Individuals who donate their time to the Trustees on a one time or ongoing basis and are unpaid. Anyone who is unpaid, including board members but not including interns, fall under this definition.

### **Interns**

Individuals who donate their time for a fixed period. Interns serve on a part time basis for 3-4 months and must have an educational/job training element to their experience. Whenever possible interns should receive credit from an accredited academic institution.



#### **D. ACCESS TO VOLUNTEER RECORDS**

The Volunteer Department maintains a record for each volunteer. The file contains information such as service history, performance evaluations, emergency notification forms, warning/disciplinary notices, certifications, and letters of commendation. Information contained in this record is confidential. Only those individuals who have a legitimate business need may review these records with the approval of the Volunteer Department. You may review or obtain a copy of your volunteer record by accessing your Hands on Connect account at any time or by submitting a written request to the Volunteer Department which will provide you with a copy of your personnel file within five business days after receipt of the written request.

#### **Volunteer Record Data Changes**

It is important that volunteer data maintained by The Trustees always be accurate and current. Therefore, it is your responsibility to update your information in Hands on Connect or notify the Volunteer Department Resources of any changes in your data, within 30 days of such changes, including your name, address, telephone number and/or cellular telephone number, emergency notification, and any other status changes.

#### **Previous Volunteering Credit**

The Trustees recognizes that former volunteers sometimes return to volunteer for The Trustees. The Trustees will only rehire former volunteers who left the organization on good terms and were noted eligible for rehire when separated from The Trustees. Your previous volunteer time will be added to your service time when you are considered for lifetime service awards. Your previous volunteer time will be added to your service time when you are considered for annual service awards only if you return within the same fiscal year.

#### **Volunteer Information**

To the extent practicable and consistent with The Trustees' operating needs, the Volunteer Department will not reveal information about you to anyone outside The Trustees without your signature on a release form unless otherwise required by law. The Volunteer Department will verify volunteer position title and dates of service, but otherwise will not reveal any other information about you to anyone outside The Trustees without your signature on a release form unless required by law.

This policy does not prevent The Trustees from using volunteer information in connection with its operating needs or from releasing such information to government agencies and others in appropriate circumstances, as determined by The Trustees in its sole discretion.

In some cases, it will be necessary for your supervisor or other department members to have your home or cell phone number to communicate with you at home on work related issues, or in the case of an emergency. If you become aware, even inadvertently, of private and confidential personnel information concerning another employee or volunteer, you shall not divulge that information.

#### **Volunteer References**

The Trustees does not give official references for volunteer other than to confirm dates of volunteer service and volunteer position titles of a volunteer. All requests for references for current or former volunteers must be referred to the Volunteer Department.

A supervisor or director may provide a reference but are not required to do so. It should be made known that the reference in no way reflects the opinion of The Trustees. It is recommended that you avoid "off the record" statements and giving opinions about capabilities of volunteers about which you have no information. Please be aware that if you give a reference or opinion, you bear the risk of your actions.

#### **E. GUIDELINES TO PREVENT VIOLATIONS OF THE BUSINESS ETHICS AND STANDARDS OF CONDUCT POLICY**

The successful business operation and reputation of The Trustees are built upon the principles of fair dealing and ethical conduct of its employees and volunteers. The Trustees wishes to uphold its reputation for integrity and

excellence, which requires careful observance of the spirit and letter of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity.

The continued success of The Trustees is dependent upon the trust of the public and our supporters, and The Trustees is dedicated to preserving that trust. The Trustees expects that you will act in a manner that will merit the continued trust and confidence of the public and our supporters.

The Trustees will comply with all applicable laws and regulations, and expects its directors, officers, employees, and volunteers to conduct business in accordance with the letter, spirit, and intent of all relevant laws and to refrain from any illegal, dishonest, or unethical conduct.

In general, the use of good judgment, based on high ethical principles, will guide you in determining what is acceptable conduct. If a situation arises with respect to which it is difficult for you to determine the proper course of action, you should consult the Volunteer Department.

### **Protecting Confidential Information**

The Trustees possesses certain confidential, proprietary, and business-sensitive information that has been and may be revealed to you while volunteering with The Trustees. The protection of confidential business information and trade secrets is vital to the interests and success of The Trustees. You must take all appropriate steps to ensure that the confidentiality of such information is maintained. Proprietary, confidential, and sensitive business information regarding The Trustees, other companies, supporters, contractors, suppliers, vendors, and anyone else doing business with The Trustees, must be treated with sensitivity and discretion, and only be disseminated on a need-to-know basis.

The Trustees expects that, as a condition of volunteering, you will keep all proprietary information strictly confidential. All confidential and proprietary information is the property of The Trustees, and you are obligated to maintain the confidentiality of this information even after termination of a volunteer position with The Trustees regardless of the reason for the termination. During the term of your volunteer position with The Trustees and thereafter, you may not, directly, or indirectly, use or disclose to anyone, or authorize disclosure or use of, any information revealed to or learned by you while volunteering with The Trustees, unless such use or disclosure is both consistent with The Trustees' obligations and for the sole purpose of carrying out The Trustees' duties.

Confidential information includes all information that has or could have commercial business value or other utility in The Trustees' business, or the unauthorized disclosure of which could be detrimental to The Trustees' interests, whether such information is specifically identified as confidential information by The Trustees. By way of example and not limitation, confidential information includes any and all information, whether or not meeting the legal definition of a trade secret, concerning: (a) The Trustees' business plans, strategic plans, forecasts, budgets, sales, projections and costs; (b) The Trustees' members or donors and prospective members or donors, including their identity, special needs, preferences, transaction histories, contacts, characteristics, agreements and contributions; (c) marketing activities, plans, promotions, operations, and research and development; (d) business operations, internal structures and financial affairs; (e) systems and procedures; (f) cost structure; (g) proposed services and products; and (h) contracts with other parties.

Volunteers who improperly use or disclose confidential business and proprietary information may be subject to disciplinary action, up to and including termination of volunteering and legal action, regardless of whether the volunteer benefits from the disclosed information.

### **Confidential and Proprietary Information of Third Parties**

The Trustees is not interested in acquiring from volunteers any trade secrets or confidential business information that they may have been acquired from others. Therefore, you shall not, while volunteering with The Trustees, improperly use or disclose any proprietary information or trade secrets of any current or former employer, or any

other person or entity with whom you have an agreement or to whom you owe a duty to keep such information in confidence.

### **Communicating Honestly and Responsibly**

You are required to disclose and record all Trustees-related business transactions in a timely manner. No secret or unrecorded funds or records are permitted. You are required to ensure that recording of all transactions is timely, accurate and complete.

### **Protecting the Trustees' Rights and Privileges**

You are required to protect The Trustees' rights and privileges. The Trustees' rights, property and facilities will be used only for The Trustees' benefit and purposes, and never for the personal benefit of individuals. For example, volunteer's telephone numbers, job titles, addresses and business cards may not be used to promote a volunteer's personal business interests. Likewise, The Trustees' name, logo and reputation may not be used to promote a volunteer's personal business interests.

### **Whistleblower Policy**

The Trustees is committed to maintaining the highest standards of conduct and ethical behavior and to promoting a working environment that values respect, fairness, and integrity. All board members, officers, employees, and volunteers shall act with honesty, integrity, and openness in fulfilling their responsibilities and must comply with all applicable laws and regulations.

As part of its commitment to ethical and legal conduct, The Trustees expects its volunteers to bring to The Trustees' attention all information about any ethical, financial, or legal concerns about The Trustees or about known or reasonably suspected violations of this commitment by other individuals. This policy is intended to ensure that volunteers of The Trustees are encouraged to report any ethical or legal concerns about The Trustees without fear of reprisal or retaliation.

### **Reporting Responsibility**

It is the responsibility of all board members, officers, employees, and volunteers to report any violations or suspected violations of Trustees policy, dishonesty, or misconduct in accordance with this Policy. Board members, officers, employees, and volunteers are also required to comply with applicable federal and state law and to report violations or suspected violations of applicable law, including but not limited to the Occupational Safety and Health Act, federal and state environmental laws, federal securities laws, and the Affordable Care Act, in accordance with this policy. This policy is intended to encourage and enable volunteers to raise serious concerns within The Trustees prior to seeking resolution outside of The Trustees.

For purposes of this Policy, misconduct and dishonesty include but are not limited to:

- Embezzlement or other financial irregularities
- Misappropriation, misapplication, destruction, removal, or concealment of property
- Forgery, falsification, or alteration of documents (checks, promissory notes, time sheets, travel expense reports, contractor agreements, purchase orders, other financial documents, electronic files, etc.).
- Improprieties/misrepresentation in the handling or reporting of money or financial transactions.
- Fraud or other unlawful acts.
- Destruction of documents (including computer files) needed in an investigation.

### **Reporting Procedures**

Before a volunteer discloses a violation outside The Trustees, the volunteer is urged to provide notice to The Trustees in accordance with this policy to allow The Trustees the reasonable opportunity, when appropriate, to take corrective action. Volunteers should report suspected misconduct or dishonesty to his or her supervisor. If for any reason a person finds it difficult to report his or her concerns to a supervisor of a staff member the person may report the concerns directly to the Department Director or in the case of allegations relating to the accounting practices or audit issues, to the Chair of the Finance & Audit Committee. Supervisors are required to report

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suspected misconduct or dishonesty to the Chief Financial Officer or in the case of allegations relating to accounting practices or audit issues, to the Chair of the Audit Committee. The Audit Committee shall address all reported concerns or complaints regarding fraud, corporate accounting practices, internal controls, or audit issues.

The Trustees expects all volunteers to report any suspected criminal activity regardless of the identity or position of the employee/volunteer involved.

### **Investigation**

While the Trustees encourages the reporting individual to reveal his or her name to facilitate investigation, all reports of suspected violation of Trustees policy or law, misconduct, or dishonesty (including concerns reported anonymously) will be investigated to the fullest extent possible under the circumstances, with documentation of the receipt, retention, investigation, and treatment of the report. Appropriate corrective action will be taken if warranted by the investigation.

### **No Retaliation**

No Board member, officer, employee, or volunteer who in good faith reports a violation pursuant to this Policy shall suffer harassment, retaliation, or adverse employment consequences. It is a violation of this Policy for anyone, whether acting alone or on behalf of The Trustees, to retaliate against any individual who makes a good faith report in accordance with this Policy. An employee who retaliates against someone who has reported a violation in good faith may be subject to discipline up to and including termination of volunteering.

### **Acting in Good Faith**

Anyone filing a report pursuant to this Policy must be acting in good faith and have reasonable grounds for suspecting that the information indicates a violation. Employees or volunteers found to have knowingly made false accusations may be subject to disciplinary action, up to and including termination of employment or volunteering.

### **Confidentiality**

Upon receipt of a report, The Trustees will promptly conduct a thorough investigation in such a way as to maintain the confidentiality of the individuals involved to the extent possible under the circumstances.

### **Contact Information**

Human Resources

[HR@thetrustees.org](mailto:HR@thetrustees.org)

## **F. PUBLIC RELATIONS GUIDELINES**

Every action you take on behalf of The Trustees must be carefully considered. The Trustees expect you to adhere to the following guidelines to ensure that public relations issues are handled properly.

### **Press Inquiries**

All contacts and inquiries initiated by the media, unless regarding a labor dispute or concerted activity protected by the National Labor Relations Act, are to be directed to the Director of Public Relations who will consult the appropriate individual to determine whether The Trustees will become an information source. If you choose to respond to contacts or inquiries initiated by the media or community regarding a labor dispute or concerted activity protected by the National Labor Relations Act, you are required to make clear that you are speaking for yourself only and not on behalf of The Trustees.

### **Private Communications**

You are expected to exercise reasonable business judgment about any activities that may draw attention to The Trustees. If you write letters to or e-mail the editor, government representatives, public agencies, or other authorities over matters of personal concern to you, these communications should not be prepared on Trustees letterhead, e-mailed from your Trustees e-mail account, or accompanied by Trustees business cards. Furthermore, no reference should be made to your affiliation with The Trustees.

## **Outside Employment**

From time to time, certain volunteers of The Trustees may receive honoraria from third parties for activities performed in their capacity as a Trustees volunteer (such as speaking engagements or guided walks and tours). Honoraria received for work done on behalf of The Trustees should be remitted to The Trustees. From time to time, an unusual circumstance could arise that would deem it appropriate for a volunteer to receive an honorarium directly. Such decisions will be determined at the sole discretion of the Chief Financial Officer after carefully considering the circumstances.

## **G. THE WORKPLACE**

### **Employee/Volunteer Conduct**

To ensure orderly operations and to provide a supportive, professional workplace, The Trustees expects you to follow rules of conduct that will protect the interests and safety of all employees, members, volunteers, vendors, and visitors. You are expected to be a positive reflection of The Trustees by being courteous to co-workers, members, volunteers, vendors, and visitors, by using The Trustees' resources and equipment for business purposes only, and by complying with The Trustees' policies and practices and with federal, state, and local laws. For all employees and volunteers, professional conduct should be a matter of course.

While it is not possible to list all forms of behavior that are considered unacceptable in the workplace, the following are examples of violations that may result in suspension and/or other disciplinary action, up to and including termination of volunteering:

- Theft, damage to or inappropriate removal or possession of Trustees property or the property of co-workers, or visitors
- Falsification of time keeping, business or travel expenses or any other volunteer records
- Working under the influence of alcohol or illegal drugs
- Possession, distribution, sale, transfer or use of alcohol or illegal drugs in the workplace, while working or while operating Trustees-owned vehicles or equipment
- Fighting or threatening violence in the workplace
- Boisterous or disruptive activity in the workplace
- Insubordination
- Conduct, including but not limited to speech, which harms or threatens harm to others or that is abusive or offensive
- Violation of safety or health rules
- Violation of Trustees policies regarding sexual or other harassment
- Possession of dangerous or unauthorized materials, such as explosives or firearms, in the workplace
- Excessive absenteeism, tardiness, abuse of meal/break periods, or any unauthorized absence
- Unauthorized use of telephones, the mail system, or any Trustees-owned equipment
- Unauthorized disclosure of proprietary, confidential, or personal information (as defined in the Personal Information Security policy herein) or violation of Trustees policies safeguarding such information
- Unsatisfactory job performance or conduct
- Unethical, dishonest, or criminal conduct

If your performance, work habits, overall attitude, conduct, or demeanor becomes unsatisfactory, as determined by The Trustees in its sole discretion, based on violations of this or of any other Trustees policies or rules, you may be subject to disciplinary action, up to and including termination of volunteering.

### **Offensive Conduct**

Offensive conduct, while not unlawful, is not appropriate in the workplace. Therefore, The Trustees prohibits conduct that a reasonable person would find offensive and unrelated to The Trustees' legitimate business interests, even if such conduct is not related to any protected characteristic.

Examples of prohibited offensive conduct include: repeated verbal abuse, such as the use of derogatory remarks and

insults; verbal or physical conduct that a reasonable person would find threatening or intimidating; persistent, malicious mistreatment that degrades or humiliates an employee or volunteer; personal attacks (*i.e.*, angry outbursts, excessive profanity, or name-calling); unreasonable interference with an employee's or volunteer's ability to do his or her work; and deliberate sabotage or undermining of a person's work performance. A single act usually does not constitute offensive conduct unless that single act is severe and egregious.

Supervisors have the right and duty to manage volunteer performance. This includes directing the way in which work is performed, undertaking performance reviews, providing feedback (including negative feedback), and disciplining and counseling volunteers. Such practices when done in a reasonable manner do not constitute offensive conduct even if an employee or volunteer disagrees with the supervisor.

The Trustees strongly encourages volunteers to promptly report offensive conduct in the workplace. Volunteers should always feel free to ask anyone who is engaging in offensive conduct to stop. In addition, if you feel that you have seen or been the victim of offensive conduct in the workplace, please report such conduct to your supervisor, the Volunteer Department, or the Human Resources Department.

## **H. SEXUAL AND OTHER HARASSMENT**

The Trustees is committed to promoting a workplace that is free of sexual and other harassment based on sex, race, or any other personal characteristic protected under federal or state law. This policy is intended to describe the conduct that is prohibited at The Trustees. As you review this policy, please keep in mind that building a respectful and professional workplace is everyone's responsibility.

### **Sexual Harassment**

The Trustees prohibits unlawful sexual harassment. Sexual harassment means sexual advances, requests for sexual favors, and/or verbal or physical conduct of a sexual nature when:

- Submission to or rejection of such advances, request, or conduct is made, either explicitly or implicitly, a term or condition of volunteering or as a basis for volunteer decisions; or
- Such advances, requests, or conduct have the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, humiliating, or sexually offensive work environment.

Under this definition, direct or implied requests by a supervisor for sexual favors in exchange for actual or promised job benefits such as favorable reviews, salary increases, promotions, increased benefits, or continued employment constitute sexual harassment.

The legal definition of sexual harassment is broad and includes other sexually oriented conduct that is unwelcome and has the effect, whether intended or not, of creating a workplace that is hostile, offensive, intimidating, or humiliating. While it is not possible to list all the circumstances that may constitute sexual harassment, the following are some examples of conduct which, if unwelcome, may constitute sexual harassment depending upon the totality of the circumstances, including the severity of the conduct and its pervasiveness:

- Sexual advances whether or not they involve physical touching;
- Epithets or jokes of a sexual nature, written or oral references to sexual conduct, gossip regarding an individual's sex life, or comment about an individual's sexual activity, deficiencies, or prowess;
- Displaying objects, pictures, or cartoons of a sexual nature;
- Leering, whistling, brushing against the body, physical touching of another's body, sexual gestures, or suggestive or insulting comments;
- Inquiries into an individual's sexual experiences, or discussion of an individual's sexual activities.
- Repeatedly asking another employee or volunteer for a date after the employee or volunteer has said no.

### **Other Harassment**

The Trustees also prohibits other forms of unlawful harassment. For purposes of this policy, other harassment is defined as verbal, written or physical conduct that denigrates or shows hostility or aversion toward an individual

because of the individual's race, color, religion, sex, pregnancy, sexual orientation, gender identity, national origin, ancestry, age, military service, application for military service, veteran status, physical or mental disability, genetic information, or any other status protected by applicable law, and that:

- has the purpose or effect of creating an intimidating, hostile or offensive work environment, or
- has the purpose or effect of unreasonably interfering with an individual's work performance.

Some examples of such harassment are: using epithets or slurs or making jokes or pranks that focus on a protected characteristic; and displaying written or graphic material that denigrates or shows hostility or aversion toward a person or group because of a protected characteristic.

### **Complaints of Harassment and/or Retaliation**

The responsibility to investigate complaints of sexual or other harassment has been assigned to the Director of Human Resources. If an employee or volunteer experiences or witnesses sexual or other harassment based on a person's protected class, the employee or volunteer should immediately report it to his or her supervisor, Volunteer Services, or Human Resources. Human Resources is available to discuss any concerns you may have and to provide information to you about The Trustees' policy on sexual and other harassment and our complaint process. Alternately, if you prefer, you may contact your supervisor or director. Employees and volunteers should not allow harassment to continue by not reporting it. Any supervisor or director receiving a report of sexual or other harassment is required to immediately report it to Human Resources.

The Trustees strictly prohibits retaliation against any employee or volunteer in connection with any good-faith report of harassment or inappropriate conduct. If you believe that you have been retaliated against in connection with any good-faith report of harassment, you should immediately report such conduct to supervisor, director, or the Director of Human Resources. Any supervisor or director receiving a report of retaliation is required to immediately report it to Human Resources.

### **Investigation**

When a complaint of harassment or retaliation is received, The Trustees will promptly investigate the allegation in a fair and expeditious manner. Any investigation will be conducted in such a way as to maintain confidentiality of the complainant to the extent practicable under the circumstances. All employees and volunteers are expected to cooperate with internal investigations. Any employee or volunteer who is found to have harassed or retaliated against another employee or volunteer will be subject to disciplinary action, up to and including termination of employment or volunteering. The Trustees will also take appropriate corrective action to address harassment by non-employees or volunteers.

The Trustees also recognizes that false accusations, especially of sexual harassment, may have serious effects on innocent persons. Any employee or volunteer found to have made false accusations of sexual or other harassment may also be subject to appropriate disciplinary action, up to and including termination of employment or volunteering.

### **State and Federal Agencies**

The following is a list of state and federal agencies that enforce employment discrimination laws:

The United States Equal Employment Opportunity Commission (EEOC)  
John F. Kennedy Federal Building 475 Government Center  
Boston, Massachusetts 02203 617/565-3200

The Massachusetts Commission Against Discrimination (MCAD)  
Boston Office:  
One Ashburton Place  
Room 601  
Boston, Massachusetts 02108 617/994-6000  
Last updated: January 2022

Springfield Office:  
436 Dwight Street  
Suite 220  
Springfield, Massachusetts 01103 413/739-2145

Worcester Office:  
455 Main Street  
Room 101  
Worcester, Massachusetts 01608 508/799-8010

New Bedford Office:  
800 Purchase Street  
Room 501  
New Bedford, Massachusetts 02740 508/990-2390

### **Fraternization**

Relationships that might be acceptable in other circumstances can pose inherent risks in the workplace, such as, claims of sexual harassment when they occur between any two employees or volunteers. Professionalism at The Trustees demands that those with authority not abuse, nor appear to abuse, the power with which they are entrusted.

It is The Trustees' policy to ensure that the work environment is free from intimate, romantic, dating, or other similar relationships between supervisors and their subordinates. This restriction extends to work relationships in which one employee supervises or manages, directly or indirectly, another employee or volunteer and/or makes decisions concerning another employee's or volunteer's terms, conditions, or privileges of volunteering. The Trustees believes that such relationships have the potential to adversely affect morale, productivity, and the operation of Trustees' business because of real or perceived favoritism, bias, or unfair treatment.

The Trustees does not intend this policy to discourage friendship or social activities among Trustees employees and volunteers. If a supervisory employee develops a romantic relationship with a subordinate (employee or volunteer), it is the responsibility of that individual to take whatever steps are needed to avoid a conflict-of-interest and seek advice from Human Resources to determine whether the relationship violates this policy. Human Resources may take any action necessary, as determined by the Trustees in its sole discretion, to address any potentially compromising situation.

### **Open Door Policy**

The Trustees is committed to providing a workplace that is supportive and responsive. Part of this commitment is encouraging an open and frank atmosphere in which any problem, complaint, suggestion, or question receives a timely response from Trustees' management. The Trustees recognizes that, as in any organization, problems may develop which require attention and understanding. We believe that it is in the best interest of both the employees or volunteer and The Trustees to resolve such matters as soon as possible. If you encounter a situation where you feel that an error has been made in the interpretation or application of a policy, you feel that you have been treated unfairly, or you encounter any other type of situation you feel is problematic, The Trustees wants you to know that you are encouraged to discuss problems openly before they become serious. You are encouraged to report disputes and conflicts to your supervisor, the Volunteer Department, Human Resources, or any other management employee with whom you feel comfortable.

### **Volunteer Uniforms**

Most field volunteers are required to wear official Trustees uniforms. Examples include maintenance staff, gatehouse attendants, rangers, events staff, and ecologists.



Other volunteers may wear uniforms when appropriate. If you have been issued a uniform garment and your position necessitates wearing such a garment, then you may only wear the issued uniform garment while working.

Your supervisor will know what the uniform requirement is for you. Supervisors are responsible for ensuring that the proper uniform be observed by all relevant staff. Uniforms are not to be worn by volunteers when off duty. Uniforms are also not for sale or donation to the public or for personal use by family members or friends.

Uniforms paid for by The Trustees are the property of The Trustees. They must be returned to the volunteer's supervisor when a volunteer leaves the organization. If that volunteer works seasonally and plans to return the next year, they should still return their garments, which will be reissued when they are return. In the case where a volunteer has purchased an optional garment, that volunteer may keep that garment but is requested not to wear it while on Trustees properties to avoid confusion by the public.

### **Electronic Communications and Other Technology**

The Trustees may provide information technology and communication resources (*e.g.*, some or all of the following: computers, tablets, personal data assistants, computer files, email, cell phones, facsimile, a voicemail system, Internet access and software, and/or other electronic communication media) to you for business purposes. All electronic and telephonic communication media and resources provided to you by The Trustees, including all communications and stored information sent, received, created on, or contained there, are the property of The Trustees ("Trustees' Information Systems") and are intended for Trustees work-related uses during work hours. All volunteers are required to comply with this important policy. Failure to do so will result in disciplinary action up to and including termination of volunteering.

### **Privacy and Monitoring**

You should have no expectation of privacy for the use of, or for the information contained in, The Trustees' Information Systems, including, without limitation, any infrequent personal use of such systems. You should not consider any material on these systems to be private. Even erased or deleted material may remain available.

To ensure that the use of electronic and telephonic communications systems and business equipment is consistent with The Trustees' legitimate business interests, authorized representatives of The Trustees may monitor the use of its systems in their sole discretion, at any time, with or without notice, and notwithstanding any password code. The Trustees reserves the right to look at, listen to, or use anything on its systems, to by-pass any password code, and may conduct unannounced inspections of these information systems. Internet-related firewalls and proxy servers (security systems designed to prevent unauthorized access to The Trustees' private network) create detailed audit logs reflecting every request for service. If monitoring reveals inappropriate usage of the system, this information will be provided to Trustees management for follow-up.

### **Acceptable Use of The Trustees' Information Systems and Communication Resources**

You are required to comply with the following guidelines:

- Information technology and communication resources provided by The Trustees should be used primarily for Trustees business during work hours. In the case of e-mail, this applies both to messages sent internally within The Trustees and to messages sent via the Internet. Any personal use of such systems should be minimal and must not interfere with your work-related activities or performance.
- Voicemail greetings and email signatures should be business-like and reflect an appropriate business-like image. The listing of a personal website or email address as part of The Trustees' email is not permitted.
- When sending or receiving email messages for business purposes, you are required to use Trustees email systems. You are prohibited from sending or forwarding Trustees-related business information to personal email accounts.
- You are prohibited from using online storage services which are not provided by The Trustees for business-related information. Restricted services include but are not limited to applications such as, iCloud, Readdle, DropBox or Box.net for storing business related files or information.

In addition:

- Software may be installed on a Trustees-issued device and activated by The Trustees at any time to track, manage, and regulate devices.
- Encryption, encrypted data, or encrypted backups may be installed or performed on a Trustees-issued device at The Trustees' sole discretion.
- The Trustees may, while performing normal business back-ups, include in the back-up personal data residing on Trustees-issued devices. You have no expectation of privacy with respect to personal information on a Trustees-issued device.
- The Trustees may at any time perform remote data wipe, resulting in loss of all data on The Trustees device.
- Executable programs obtained from external sources (email or through the internet) are not to be run on any computers under any circumstances. The use of unauthorized software obtained in this manner can introduce destructive viruses into The Trustees' networks, can prove to be incompatible with Trustees-supplied software, and can, at the very least, lead to degradation of system performance.
- Communications (e.g., email, text, and voicemail messages) may be inadvertently intercepted by someone who was not meant to receive them. For that reason, you must use good judgment and ensure the protection and non-disclosure of information that is confidential. Sensitive email communications should be clearly labeled "Confidential."
- Regardless of the time and location of use, you are expected to exercise good judgment in the use of Trustees information systems. The Trustees' systems may not be used to communicate improper messages, e.g., messages that are threatening, vulgar, insulting, harassing, defamatory, derogatory, obscene, or otherwise inappropriate. The communication of threats or use of foul or abusive language may be grounds for disciplinary action, up to and including termination. Furthermore, except as is otherwise required in order to conduct business, The Trustees' network, including but not limited to the internet feature, is not to be used to access, view, download, send, copy, print or in any way communicate or see harassing or otherwise offensive material or messages, documents or files that include intimidating, hostile or offensive material on the basis of race, color, religion, national origin, sex, age, disability, family status, sexual orientation, genetic information, or any other category protected by law. To be clear, The Trustees' policies against sexual and other types of harassment fully apply to use of The Trustees' information systems.
- The Trustees' information technology and communication resources should not be used for personal profit or gain (or for any purpose aimed at obtaining personal profit or gain), solicitation of non- Trustees related business, selling non-Trustees related products or otherwise engaging in non-Trustees related commercial activities other than those expressly permitted by Trustees management.
- You are prohibited from infringing on the rights of third parties, including intellectual property rights, whether relating to trademarks, copyrights, logos, multimedia creations, software, text, photos, or images of any kind. Any statement with respect to copyright may not be deleted and reproduction, adaption, or modification of the work of an author without his or her consent is prohibited. You are prohibited from using links to websites which violate the law or infringe on third-party rights.
- You are prohibited from non-business use of Trustees' information systems that taxes the system's bandwidth and speed such as streaming audio or video for personal use.

If you are made aware of inappropriate use of Trustees' systems, including information security violations or the possible introduction of a virus, you should immediately notify Human Resources.

If you have questions about this policy or need more information, please contact the Volunteer Department.

### **System Security**

You are responsible for ensuring that your use of The Trustees' electronic information and communication systems does not compromise the security of The Trustees' computer systems and networks. These duties include taking reasonable precautions to prevent intruders from accessing The Trustees' network by selecting a password and keeping it secret, logging off the network before leaving the office, following all password and user authentication protocols, and complying with The Trustees' firewall, anti-virus, and spyware requirements.

You are prohibited from stealing, using, or disclosing *another employee's or volunteer's* code or password and from accessing any email or voicemail other than your own, except when a password is shared in a business-critical case. You are also prohibited from sharing *your* Trustees network or system passwords with co-workers, family, friends, or anyone outside of The Trustees.

All material received on any magnetic or optical medium and all material downloaded from the Internet or from computers and networks not belonging to The Trustees must be scanned for viruses and other destructive programs before being placed on the computer system. In addition, because home computers or laptops may contain viruses, files transferred from the computers or laptops to The Trustees network must be scanned for viruses.

Only authorized persons are permitted to install and repair Trustees equipment. You are required to use The Trustees' anti-theft systems, you must exercise vigilance when equipment is used outside of Trustees premises, and you must return all Trustees equipment when your volunteering with The Trustees ends. In the event of theft or other loss of Trustees equipment, you are required to immediately notify the Volunteer Department.

### **Software**

The Trustees purchases and licenses the use of computer software for business purposes and does not own the copyright to this software or its related documentation. You are prohibited from installing or downloading software to Trustees equipment without approval by Trustees management. Any approved purchase of software licenses must be for Trustees business purposes and not for personal use of employees or volunteers. The Trustees does not own the copyright to this software or its related documentation, and any deletion of the copyright notices in such software is prohibited. You may only use software in accordance with the relevant software license agreement and are required to abide by any limitations contained in the applicable license, including limitations on reproduction and modification. The Trustees prohibits the illegal duplication of software and its related documentation.

You may not install or use encryption software on any Trustees computers or network without first obtaining written authorization from Human Resources. Further, you are required to follow Trustees encryption protocols.

## **J. SOCIAL MEDIA POLICY**

The Trustees encourage communication among our employees, visitors, supporters, partners, volunteers, and others. To assist volunteers in facilitating these conversations, increasing engagement, and making responsible decisions about their use of social media, the following policy and guidelines have been established for appropriate use of social media when using the Trustees' electronic communications equipment during work hours and when using your own electronic communications equipment on your own time. For purposes of this policy and guidelines, social media includes all means of communicating or posting information or content of any sort online, including Internet bulletin boards, "blogs," "chat rooms," or other websites or online resources, whether or not associated or affiliated with the Trustees, as well as any other form of online communication (collectively Social Media).

If you are posting to an authorized Trustees' Social Media page (e.g., the Trustees' Facebook, Twitter, etc.) or posting a message that is in the Trustees' name or could reasonably be attributed to the Trustees, you must first have permission from your supervisor to do so. If you wish to start a new Social Media page on Trustees' Social Media, you must receive approval from your supervisor and the Marketing & Communications Department prior to starting your Social Media project.

If you are approved to participate in Social Media on behalf of the Trustees, the Trustees ask that you follow these guidelines.

- Stick to your area of expertise.
- Post meaningful, respectful comments.
- Always pause and review your content before posting.
- Respect proprietary information and content.
- Do not disclose confidential information (as defined below) or personal information as defined by MA law.

- Do not post any information about the Trustees' visitors or supporters.
- Posting photos or videos of anyone on behalf of the Trustees always requires a photo release – this is especially important with children. The rule is you need an adult's signature to post a photo of them, and you need a parent's signature to post a photo of their child.
- For safety reasons, never include names (of adults or children) in any photo.
- Limit your personal use of Trustees' equipment during work hours

If you participate in Social Media on your personal time – and are posting about The Trustees –we ask that you follow these guidelines.

- Take particular care when posting photos or video. It is unacceptable to post photos or video of children (anyone under 18), or adults engaged in Trustees' activities or at Trustees' properties AT ALL on your personal site/page.
- If you choose to talk about your Trustees' work via your personal online accounts, please disclose your relationship with The Trustees.
- Always be mindful of your confidentiality obligations. Specifically, you may not disclose the Trustees' confidential information (as defined below).
- Do not use the Trustees' logos, trademarks, slogans, or similar material for your personal business.
- Harassment of employees, visitors, supporters, partners, volunteers, and others will not be tolerated. Avoid using statements, photographs, video, or audio that reasonably could be viewed as malicious, obscene, threatening, or intimidating, that disparage visitors, supporters, partners, vendors, or suppliers, or that might constitute harassment or bullying.
- Recognize that everything you write or receive on a Social Media site is public, regardless of your privacy settings. Anyone on the web can get access to your activity on Social Media sites.

For purposes of this policy and guidelines, confidential information may include, but is not limited to, information regarding the development of systems, processes, know-how and technology, information regarding The Trustees' visitors, supporters, and partners, budget information, financial projection and other information relating to The Trustees' operations. In addition, confidential information includes "Personal Information," as defined in the Trustees' Personal Information Security Policy. For purpose of this policy and guidelines, confidential information does not include information regarding the terms and conditions of employment with The Trustees or other information the disclosure of which is protected by the National Labor Relations Act (the "NLRA").

The Trustees, in its sole discretion, will determine whether a particular Social Media communication violates Trustees' policies. The Trustees further reserves the right to require that volunteers edit or remove any communication or post, in accordance with the Trustees' policies and/or applicable law. Should you have any questions about this policy or how it may apply to your online communications, please contact the Volunteer Department or Human Resources.

#### **K. PERSONAL INFORMATION SECURITY POLICY**

The Trustees recognizes the importance of maintaining the security of personal information and therefore complies with all laws regulating the retention of such information. For purposes of this policy and In accordance with applicable law, "personal information" is defined as a Massachusetts resident's first name and last name, or first initial and last name, in combination with any one or more of the following data elements that relate to such resident: (a) Social Security number, (b) driver's license number or state-issued identification card number, or (c) financial account number, or credit or debit card number, with or without any required security code, access code, personal identification number or password, that would permit access to a resident's financial account. Personal information may be found in printed documents and hard files, but can also be collected, accessed, and stored electronically. Personal information is covered by this policy whether it is printed or electronically stored.

Employees and volunteers are required to take all reasonable measures to limit access to personal information, and to limit the collection or retention of personal information, to only what is reasonably necessary to accomplish the legitimate purpose for which the personal information is collected, stored, or accessed. Further, employees and

volunteers are required to comply with all information security laws and regulations, and any other policies and procedures adopted by The Trustees to comply with The Trustees' obligations to maintain the security of personal information. Employees and volunteers will be provided with and required to abide by all requirements set forth within The Trustees' Written Information Security Program ("WISP").

### **Policy Responsibility**

Human Resources has responsibility for ensuring adherence to The Trustees' Personal Information Security Policy. Any questions concerning these policies should be directed to Human Resources.

### **Telephone Usage and Monitoring**

Trustees telephones are to be used for Trustees business purposes only. You may be required to reimburse The Trustees for any charges to The Trustees resulting from your personal use of its telephone. The Trustees has the capability to monitor long-distance phone charges and reserves the right to scrutinize this information, as well as to assess charges for calls that are deemed personal in nature.

To ensure effective telephone communications, you should always speak in a courteous and professional manner. If you are unable to help a caller, you should transfer the caller to an employee who may be able to provide assistance.

To ensure that the public receives the service they deserve, The Trustees is committed to developing employees and volunteers so that they may perform to the best of their abilities. For employees whose primary responsibility is servicing the public over the telephone, The Trustees may, at its discretion, monitor and/or record business conversations. It is essential to regularly monitor the performance of volunteers in these types of positions to ensure that customer service skills are developed, and that each volunteer is meeting the standards and expectations specifically set for that position. If your position is one in which telephone monitoring and/or recording will be utilized, you will be notified and given information about the process.

### **Use of Cellular Telephones and Other Communication Devices**

The Trustees is committed to protecting you and others from the problems that can be caused by inappropriate use of a cellular telephone, PDA, smart phone or other communication device for telephone calls, text messaging, reading/sending email and/or accessing the Internet (collectively referred to as "Communication Devices").

To minimize distractions within The Trustees and to promote productivity, if you use a Communication Device in the workplace, you are required to adhere to the following guidelines:

- While at work, employees and volunteers are expected to exercise discretion in using personal cellular telephones as is expected for the use of Trustees telephones.
- While the Trustees recognizes that the use of such Communication Devices is often an important way for family members to reach each other, Communication Devices should only be used in an emergency, and thus infrequent, basis during the workday.
- Employees and volunteers are expected to participate in any personal telephone calls on non-work time and to ensure that friends and family members are aware of Trustees policy.
- Ring tones must be switched off or to a "vibrate" mode to prevent distractions to co-workers.
- All employees and volunteers are required to comply fully with The Trustees' policy on Mobile Phone and Mobile Device Use and Reimbursement.

If you use Communication Devices while traveling outside of The Trustees' offices, you are required to adhere to the following guidelines:

- You are not to use a Communication Device while operating any motor vehicle while engaged in Trustees business, or while operating a Trustees-owned vehicle at any time. If you use Communication Devices while in any motor vehicle during work hours or while you are engaged in Trustees-related business, you are expected to pull over to the side of the road before making or receiving calls, text messaging, reading/sending email or accessing the Internet. Similarly, if you use a Communication Device while in a Trustees-owned vehicle, you are at all times expected to pull over to the

side of the road before making or receiving calls, text messaging, reading/sending email or accessing the Internet.

You must adhere to all federal, state, and local laws, regulations and ordinances governing the use of cellular telephones and all other Communication Devices while driving. The use of a cellular telephone while driving is illegal in several states and certain Massachusetts localities. In addition, texting while driving is illegal in Massachusetts.

- If you are charged with traffic violations or any criminal action resulting from the use of a Communication Device, you will be solely responsible for all liabilities that result from such use.
- You are always expected to exercise discretion and care while utilizing any Communication Device, and to avoid placing yourself or others at risk.

If you have any questions regarding this Policy, please contact Volunteer Services.

#### **Use of the Mail System**

You should not use The Trustees' mailing address to receive personal mail. The use of Trustees-paid postage for personal correspondence is also prohibited.

#### **Use of The Trustees Equipment**

You are required to use all Trustees equipment correctly and to keep all Trustees equipment in good repair. If a piece of equipment is not working properly, you should not attempt to fix it. Instead, you are expected to notify your supervisor promptly.

Also, employees and volunteers should not use Trustees tools or any other Trustees property for personal use.

#### **Use of The Trustees Vehicles**

The Trustees' vehicles are to be used for business purposes and by authorized employees and volunteers only. Employees and volunteers should not use Trustees vehicles for personal use. At no time should children, spouses, or any non-employee/non-volunteer be present or transported in a Trustees vehicle.

You are prohibited from operating a Trustees vehicle while in the possession of or under the influence of drugs or alcohol. You are also prohibited from operating a Trustees vehicle with a suspended, invalid, or revoked driver's license. If your position requires you to drive to conduct Trustees' business, you must notify Human Resources immediately if your license is revoked, suspended, or otherwise becomes invalid.

For more information regarding the Trustees Driving Policy please see Appendix A

### **L. SOLICITATION AND DISTRIBUTION**

#### **Non-Employees**

In an effort to ensure a productive work environment, persons who are not employed by or volunteers with The Trustees are prohibited from soliciting or distributing literature or other materials, for any purpose and at any time, within The Trustees' buildings, premises, or property.

The Trustees recognizes that as volunteers you may have interests in events and organizations outside the workplace. However, volunteers are prohibited from soliciting or distributing literature or other materials regarding any activities during their work time and during the work time of the employee(s) being solicited or receiving the distribution.

Moreover, you are prohibited from distributing literature or other materials at any time in The Trustees work areas.

## **Definitions for the Purposes of this Policy**

- “Soliciting” includes approaching anyone for any of the following purposes: offering anything for sale, asking for donations, collecting funds, canvassing, or seeking to promote, encouraging, or discouraging (i) participation in or support for any organization, activity, or event or (ii) membership in any organization. Handing out or delivering membership cards or applications for any organization is considered soliciting.
- “Distributing literature or other materials” includes handing out or delivering to anyone any literature or any other printed or written materials (except that handing out or delivering membership cards or applications for any organization is considered soliciting).
- “Work time” does not include meal periods, coffee breaks or rest periods or other specified periods during the workday when you are properly not engaged in performing your work duties.
- “Work areas” includes The Trustees buildings, premises or property or any other location at which you are performing work on behalf of The Trustees.

## **BULLETIN BOARDS**

You may not post inappropriate, offensive, or harassing information on any bulletin board on Trustees premises. Notices, posters, and other materials may not be posted on walls, doors, or other areas of Trustees offices.

## **M. HEALTH AND SAFETY**

The Trustees, as a matter of policy and as required under the Occupational Safety and Health Act (OSHA) and any other applicable law, makes every effort to furnish a place of employment free from recognized hazards, however, a safe and healthy work environment is everyone’s responsibility.

The Trustees provides information to you regarding workplace safety and health issues through regular internal communication channels such as supervisor-volunteer meetings, bulletin boards, tailgate meetings, memoranda, and other written communications. Your supervisor will brief you on safety precautions before you start work and can provide you with the necessary protective equipment you may need on your job. As a volunteer with The Trustees, you are expected to comply with all safety and health standards, rules, and regulations, and to exercise caution in all workplace activities. You share a dual responsibility with The Trustees for maintaining safe working conditions. If you find a safety or work hazard, you must immediately report it to your supervisor, the Volunteer Department, or Human Resources and the local representative of the Safety Committee. Volunteers who violate safety standards, who cause hazardous or dangerous situations, or who fail to report or, where appropriate, remedy such situations, may be subject to disciplinary action, up to and including termination of volunteering.

If you have any questions, please discuss them immediately with your supervisor, Volunteer Services, Human Resources, or a member of the Safety Committee.

## **Workplace Injuries**

You are required to report all workplace injuries to your supervisor, the Volunteer Department, and Human Resources, regardless of how insignificant the injury may appear. This will enable The Trustees to process any workers’ compensation claim that may be associated with the accident or injury. It may also help prevent a similar accident or injury in the future.

All accidents/injuries must be reported to your supervisor immediately and injured staff or volunteers should receive immediate attention. The procedure is as follows:

- If you sustain any injury at work, you must immediately notify your supervisor who will in turn will complete an Accident Investigation notice and notify the Volunteer Department and Human Resources.
- Your supervisor will help you to locate first aid for minor injuries, if appropriate.
- You may also go to the nearest hospital for care, if desired or necessary. Your supervisor or a designee should be aware of the closest hospital and should accompany you on your visit.
- All invoices and receipts for expenses must be submitted to Human Resources for forwarding to the insurance company. Please ensure that The Trustees’ address (200 High Street, 4<sup>th</sup> Floor, Boston, MA 02152 Attn: Human

Resources) is on any invoices, or doctor or hospital report.

Documentation should be submitted to your supervisor that specifies the date of your injury, any subsequent days off, and expected date of return. Your supervisor will forward the necessary incident report on to the Human Resources and Volunteer Departments.

A letter from the attending physician documenting any period of absence from work due to injury along with an explanation of your injury and prognosis must be submitted to your supervisor. This information is passed on to the insurance company and is the basis on which they make their decision regarding payments to you. For this reason, it is important to get a doctor's note in a timely manner.

You are also required to call your supervisor once a week while out of work due to a work-related injury. The Trustees reserves the right to request a written statement from your physician at any other time during the injury period.

Starting from your first day out of work there is an elimination period of five days with no pay from the insurance company. The insurance company has fourteen (14) days to either approve or deny payments. The insurance company makes payments on approved claims retroactively (i.e., to the first day on which you were unable to work due to the injury if you are incapacitated for more than twenty-one days). NOTE: Under Massachusetts law, the rate is approximately 60% of your gross salary (and is not taxable), while there is a cap imposed by the state which changes regularly. This amount is based on your earning of the previous 52 weeks.

When you return to work, you should report to your supervisor with the attending physician's statement authorizing you to return to normal (or light) duty.

### **Communicable Diseases in the Workplace**

The Trustees reserves the right to exclude a person with a communicable illness from work if The Trustees finds that, based on a medical determination, such restriction is necessary for the welfare of the person who has the communicable illness and/or the welfare of other employees, members, volunteers, or visitors.

If you have questions or concerns about communicable illnesses, you are encouraged to contact the Volunteer Department or Human Resources for information and referral to appropriate services and resources.

### **Reasonable Accommodations**

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with disabilities, The Trustees will make reasonable accommodation(s) that are medically necessary for the known physical or mental impairments of an otherwise qualified volunteer with a disability, unless The Trustees determines in its sole discretion that such accommodation(s) would result in undue hardship to The Trustees. Any volunteer who seeks an accommodation must comply with the following process:

- Notify your supervisor or the Volunteer Department that you are requesting an accommodation to enable you to perform the essential functions of your position.
- When requesting an accommodation, you are required to provide the Volunteer Department written documentation from a medical provider supporting your need for an accommodation. The written documentation must include the name of your medical provider, the anticipated duration of the need for an accommodation (*e.g.*, for a specified number of months or permanently), the medical basis for the accommodation and the specific part of your job that you are not able to perform. **Please note, the medical information required in this step of the process must be given to the Volunteer Department and should not be given to your supervisor.** All medical information provided to The Trustees will be kept confidential in a separate file and will only be shared with other employees at The Trustees on a need-to-know basis.
- After receiving the required medical information, a Volunteer Department representative will meet with you to discuss the functional limitations caused by the disability and potential reasonable accommodations, if any, that are



available and that would not create an undue hardship on The Trustees.

- The Trustees will then approve the requested accommodation, offer a reasonable alternative, or deny the requested accommodation.
- The Trustees will notify you in writing of The Trustees' determination.
- Do not assume that an accommodation has been granted until you receive written confirmation from The Trustees.

### **Alcohol and Drugs Policy**

The Trustees operates a drug and alcohol-free workplace, and all Trustees' premises are to be kept drug and alcohol free. For purposes of this policy, Trustees premises include all land, property, buildings, structures, parking lots, means of transportation owned or leased by The Trustees or otherwise being used for Trustees business, as well as Trustees sponsored events, wherever they are held. Violation of this policy is grounds for disciplinary action, up to and including termination.

### **Alcohol in the Workplace**

You are prohibited from reporting to work or performing work for The Trustees under the influence of alcohol. You are also prohibited from consuming alcohol on Trustees premises or while otherwise engaged in Trustees business unless alcohol is served at a Trustees-sponsored event or function. Use of alcohol in a Trustees-owned vehicle or in any motor vehicle while engaged in Trustees business is prohibited, as is the operation of any motor vehicle on Trustees business while under the influence of alcohol. In addition, the unauthorized sale, purchase, transfer, or possession of alcohol on Trustees premises, in Trustees vehicles, or while otherwise engaged in Trustees business is prohibited.

Certain Trustees-sponsored social functions may be excluded from the prohibition of alcoholic beverage consumption, with the authorization of the President, provided your consumption of alcohol is in moderation at all times and you behave professionally and in accordance with common standards of acceptable conduct at all times.

The Trustees reserves the right to approve a request for alcohol education and/or treatment as an alternative to or in conjunction with disciplinary action for any violation of this policy.

### **Drug-Free Workplace**

The Trustees strives to maintain a safe workplace and thus prohibits drug activity while on Trustees premises or otherwise volunteering on behalf of the Trustees. The use of illegal drugs or other controlled substances (including marijuana) threatens the entire environment and will not be tolerated. This policy applies to every Trustees volunteer.

Volunteers are prohibited from reporting to work or performing any job-related activities, on or off Trustees premises, while under the influence of any illegal controlled substance (including marijuana). An illegal controlled substance is any drug that is unlawful under federal, state, or local law, including marijuana, as well as any drug that, though available legally, has been obtained illegally. Volunteers are also prohibited from being under the influence of, or impaired by, alcohol or any other substance (including, but not limited to, any prescription or over-the-counter medication) that impairs the volunteer's job performance or poses a hazard to the safety and welfare of the volunteer, the public, the Trustees, employees, other volunteers and our members or our visitors.

This policy does not prohibit the use or possession of a controlled substance (with the exception of marijuana) in accordance with a valid medical prescription issued to a volunteer by a licensed physician, provided that use of the prescribed medication does not impair a volunteer's ability to perform his or her job duties safely and effectively. If a volunteer is unable to perform his or her job duties safely and effectively while taking a prescribed medication, the volunteer may be reassigned or, if no suitable position is available, may be placed on a leave of absence.

Trustees' volunteers shall not unlawfully manufacture, distribute, dispense, possess, sell, purchase, or use a controlled substance anywhere on Trustees premises.

**These guidelines apply to all volunteers. Any questions or concerns should be directed to the Volunteer Department. Volunteers who violate this policy are subject to disciplinary action, up to and including termination of volunteering.**

### **Smoking Policy**

To provide a safe and healthy work environment and in compliance with the Massachusetts Smoke-Free Workplace Law, The Trustees prohibits smoking in enclosed workplaces, including vehicles owned by The Trustees. At all times, smoking is limited to outside designated smoking areas. Smoking is strictly prohibited while operating any type of machinery. Employees are expected to inform visitors and volunteers of this policy when necessary. Violation of this policy may lead to disciplinary action, up to and including termination of employment.

For purposes of this policy, “smoking” includes the use of tobacco products through pipes, cigars and cigarettes and the use of e-cigarettes, regardless of whether they contain tobacco. This policy applies to all employees, members, visitors, volunteers, and vendors.

### **Violence in the Workplace**

In addition to providing a productive working atmosphere, The Trustees is also committed to ensuring that you enjoy a safe and healthy work environment that is free from acts of violence or threats of violence. Mutual respect and civility are always expected of all employees and volunteers.

In keeping this commitment, employees and volunteers are strictly prohibited from threatening violence or committing any act of violence in the workplace (*e.g.*, physical altercations, verbal/written attacks, and other such inappropriate conduct, etc.), while on duty, while on Trustees-related business, or while off-duty if The Trustees determines that the incident may adversely affect the interests of The Trustees. This policy applies to all employees and volunteers, including supervisors and non-supervisory employees and volunteers. It also applies to third parties, including employee and volunteer guests, independent contractors, and anyone else who is on Trustees property or engaged in Trustees business. The Trustees has zero tolerance for individuals, employees, and volunteers who make threats, engage in threatening behavior, or commit acts of violence against employees, visitors, guests, volunteers, or other individuals. Compliance with this policy is every employee’s and volunteer’s responsibility.

You are required to immediately report to a supervisor, or the Volunteer Department, any incident involving a threat of violence or violent behavior. If you are confronted with a potentially violent situation while in the workplace, you should not attempt to handle the situation, but should call 911 if the situation warrants police involvement, seek medical treatment if such treatment is needed, and/or immediately report it to your supervisor or director. Also, such situation must be reported to the Volunteer Department as soon as possible. If a report is made to a supervisor or member of management, that individual must immediately inform the Volunteer Department. The Volunteer Department and Human Resources will promptly investigate the matter and take appropriate corrective action, if required. This action may include disciplinary action, up to and including immediate termination of employment.

If you become aware of any workplace security hazards, or if you have suggestions for increasing security in the workplace, please speak with your supervisor, the Volunteer Department, or Human Resources. The Trustees encourages volunteers to help make the workplace as safe and secure as possible.

You are prohibited from bringing onto Trustees’ premises any firearms, weapons, explosives, incendiary devices, or similar material at any time. This policy includes a prohibition against having prohibited material in your vehicle while stored in or parked on Trustees’ property. Volunteers who have licenses to carry weapons must also comply with this policy at all times. Violation of this policy will result in immediate discharge.

You are required to report any violation of this policy, including any incidents involving actual or threatened violence. The Trustees prohibits retaliation in connection with a good faith complaint regarding actual or threatened violence.

**Personal Property**

While you are at work, you are expected to take responsibility for your own personal belongings and are encouraged to secure any valuable possessions you might have. The Trustees may provide you with a locked space in your work area. The Trustees is unable to accept responsibility for the safety of personal property.

**Search and Seizure**

The Trustees reserves the right to conduct a search of any employee or volunteer that is reasonable in scope, and/or a search of the employee's or volunteer's locker or other personal possessions, on The Trustees' premises or on property rented or leased by The Trustees at any time if The Trustees has reasonable suspicion to believe that a policy has been violated or the employee or volunteer possesses an item, the possession of which constitutes a criminal offense under federal law, or under the laws of the Commonwealth of Massachusetts, or which violates any policy of the Trustees.

**Absence and Tardiness**

You are expected to report for work at your scheduled start time, which should be determined by your supervisor prior to your first day of work. Normal business hours are generally 9:00 a.m. – 5:00 p.m. every day but your volunteer shift will be based on your position, location, and scope of responsibilities. Your punctuality and attendance during your volunteer commitment are essential to the smooth operation of The Trustees and is an important factor of job success.

Occasionally, your department may need earlier or later coverage and your workday, with your supervisor's request/approval, may start or end earlier or later. It is expected that you will be flexible when department needs require different starting and/or ending times, with every effort made to notify you as far in advance as possible. You are not required to work hours that fall outside of your agreed upon start/end time.

If you think you may be late to work for any reason, notify your supervisor within 30 minutes prior to the beginning of your assigned report to work time.

Tardiness and excessive absenteeism may result in disciplinary action, up to and including termination of volunteering. If you fail to report to work for more than three (3) consecutive shifts without notifying your supervisor, you will be considered to have abandoned your position, effective as of the start of business on the fourth day of absence.

**Lunch and Break Policy**

Volunteers are entitled to regular breaks during their shifts. When working 6 or more hours, you are entitled to a minimum 30-minute lunch break at the discretion of your supervisor.

**VolunteerConnect**

The Trustees' time and attendance reporting process is designed to accurately record hours worked for volunteers. This allows The Trustees to report out volunteer hours for tax purposes and grants. Additionally, to satisfy Worker's Compensation requirements, The Trustees must prove that you were actively volunteering at the time of your injury.

All volunteers will be issued a login and password for VolunteerConnect. All volunteers are required to log their hours in a timely fashion, preferably by close of business on the day you volunteer but no later than the last day of each month.

Training is done in person, via remote options or via e-mail. The Training Manual is attached.

**Volunteering of Minors**

Minors are eligible to hold volunteer positions with The Trustees with their parent's/guardian's approval. Staff are not required to take on minor volunteers in specific jobs during the summer months. When hiring minor volunteers,

The Trustees will adhere to applicable laws concerning the employment & volunteer positions of such minors. Maximum limits on hours worked by minors shall strictly be adhered to and minors will in no instances work where alcohol is being served. Supervisors of employees and volunteers under the age of 18 will ensure that:

- The volunteer position is not detrimental to the minor's health and/or welfare;
- The minor will be adequately supervised;
- Volunteering does not interfere with the minor's education.

Please contact the Volunteer Department if you have any questions about working with volunteers under the age of 18 or have concerns about a specific situation.

### **Accommodations for Nursing Mothers**

The Trustees will provide a clean, private location other than a bathroom which may be used to express breast milk. In addition, for up to one year following the birth of your child, you are permitted to take reasonable breaks for the purpose of expressing breast milk. To the extent possible, such breaks shall be simultaneous with any paid breaks already provided to you. If you need to take time to express breast milk beyond the time already permitted for breaks, such time will be unpaid.

If you choose to express breast milk at work, you must provide reasonable notice to the Volunteer Department to enable The Trustees to provide a suitable location for expressing breast milk.

### **Inclement Weather**

In the event of inclement weather, the Directors or their designees will make a decision regarding opening, opening late, or closing early; check with your supervisor for complete details.

If the Trustees is open for business, the Trustees requests that all volunteers make every reasonable effort to arrive to work as timely and safely as possible. All volunteers should exercise their own good judgment, depending on local conditions and the safety of travel. Volunteers who are not able to report to work due to severe weather conditions should call their supervisor as early as possible.

## **N. TIME OFF**

### **Vacation Time**

Please inform your supervisor of any planned vacations with as much notice as possible.

### **Holidays**

Volunteers are not required to work holidays. However, the Trustees operates 363 days a year and occasionally there are volunteer opportunities that occur on holidays. If a holiday falls on your regularly scheduled volunteer shift and the Trustees is open, please communicate with your supervisor as soon as possible about your plans for that day.

### **Sick Leave**

Please inform your supervisor as soon as possible if you expect to miss a scheduled shift due to illness.

### **Notice**

If the need for extended sick time is foreseeable, you are asked to make a good-faith effort to notify your supervisor in advance of any absence, late arrival, or early departure for a reason covered under this policy. If your need for sick time is not foreseeable, please notify your supervisor as soon as practicable under the circumstances. If you will be out of work for more than one day, you are asked to notify your supervisor of the expected duration of the absence or provide notice at the beginning of each day of absence.

## **BENEFITS**

### **Volunteer Benefits**

Eligible volunteers at The Trustees are provided with a wide range of benefits. Some benefit programs are specific to your position, region, or property but all volunteers are eligible to receive statewide benefits.

All active Trustees volunteers are eligible to be nominated for the Volunteer of the Year award. Individuals are nominated by their supervisor or another Trustees staff member with whom they have worked. Nominations are solicited in July/August and the awardee chosen in September. The awardee is then honored at the Trustees Annual Meeting in early November.

### **Workers' Compensation**

You are protected by workers' compensation insurance for occupational illness or injury. Workers' compensation insurance benefits provide protection to employees, volunteers, and The Trustees if you are injured in an on-the-job accident.

Neither the Trustees nor its insurance carrier will be liable for the payment of workers' compensation insurance benefits for injuries that occur during your voluntary participation in any off-duty recreational, social, or athletic activity sponsored by The Trustees.

### **Performance Improvement**

In dealing with deficiencies in conduct and work performance, The Trustees strives to be fair and consistent in its treatment of volunteers. The Trustees expects you to perform your responsibilities and conduct yourself in accordance with established policies and procedures, with honesty and the highest standard of personal integrity, and within the established goals and responsibilities for your position.

Whenever a problem concerning performance or conduct is identified, it should be addressed with a volunteer by his or her supervisor. Many factors are taken into consideration if it becomes necessary to take disciplinary action, including the nature and seriousness of the offense, your past record, the total impact on your department and The Trustees and any mitigating or aggravating circumstances. In general, disciplinary action may include any or all the following measures:

- Verbal counseling
- Verbal warning(s)
- Written warning(s)
- Termination of volunteering

The nature of the offense and the particular circumstances determine whether any or all the measures are implemented. The purpose of disciplinary measures short of termination of volunteering is corrective, to encourage you to improve your conduct or performance so that you may continue your volunteer position with The Trustees. However, this policy does not create or constitute any contractual rights, promises or binding obligations of any kind with respect to the terms and conditions of volunteering.

These disciplinary measures will not apply in the event of an offense that warrants immediate termination of volunteering or in other circumstances when The Trustees determines, in its sole discretion, that intermediate measures would be inappropriate.

## **P. TERMINATION OF VOLUNTEERING**

The last day of actual volunteering for The Trustees will be considered your termination date.

### **Voluntary Termination**

A voluntary termination of volunteering is a termination of volunteering initiated by you. A voluntary termination may occur:

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- by written resignation;
- because of an absence from work for more than three (3) consecutive shifts without notifying the Trustees; or
- because of a failure to return to work at the expiration of a leave of absence.

If you plan to leave The Trustees, it is requested that you give your supervisor as much advanced notice as possible. This allows for them to begin the process of finding your replacement.

### **Involuntary Termination**

An involuntary termination is any termination of volunteering initiated by The Trustees. An involuntary termination may occur because of your unsatisfactory performance or misconduct or it may result from other reasons or circumstances, such as a reduction in force or a personnel problem or any other situation in which The Trustees determines that termination of volunteering is appropriate.

Involuntary termination will be the decision of your supervisor in conjunction with the Volunteer Department.

### **Return of The Trustees Property**

You are responsible for all Trustees property, materials, and written or electronic information issued to you or in your possession or control. You must return all Trustees-owned property (*e.g.*, keys, credit cards, ID cards, computers, uniforms, passwords, etc.) to your supervisor in satisfactory condition immediately upon request or upon voluntary or involuntary termination of volunteering. You may not retain copies of such property, materials or written or electronic information.

## **APPENDIX A.**

### **CRIMINAL BACKGROUND CHECK**

This policy is applicable to the criminal history screening of prospective and current employees, volunteers, and interns.

The Trustees of Reservations (the “Trustees”) conducts criminal background checks on prospective and current employees, volunteers, and interns: (1) by obtaining Criminal Offender Record Information (“CORI”) directly from the Massachusetts Department of Criminal Justice Information Services (“DCJIS”); and (2) through a consumer reporting agency (“CRA”) that obtains, on behalf of the Trustees, CORI from the DCJIS and other criminal history information from a source other than the DCJIS (“Other Criminal History Information”).

Where CORI and Other Criminal History Information checks may be part of a general background check for employment, internship or volunteer work, the following practices and procedures will be followed.

#### **P. CONDUCTING SCREENING**

The Trustees will conduct CORI checks as authorized by the DCJIS and MGL c. 6, § 172, after the Trustees obtains a completed CORI Acknowledgement Form. The CRA will conduct CORI checks, on behalf of the Trustees, after the Trustees notifies prospective and current employees, volunteers, and interns in writing and in a separate document that a consumer report containing Other Criminal History Information may be used in the employment, volunteer service or internship decision-making process and obtains their separate written authorization to conduct criminal background screening.

If a new CORI check is to be conducted on an individual within a year of his or her signing the CORI Acknowledgement Form, the individual will be given seventy-two (72) hours’ notice that a new CORI check will be conducted.

The Trustees will conduct Other Criminal History Information checks, through the CRA, as authorized by and in accordance with applicable federal and state laws.

## **II. ACCESS TO RECORDS**

All CORI obtained from the DCJIS is confidential, whether obtained directly by the Trustees or through the CRA, and all Other Criminal History Information is confidential, and access to the information must be limited to those individuals who have a “need to know.” This includes, but is not limited to: hiring managers, staff submitting CORI and Other Criminal History Information requests, staff responsible for processing job applications, the Human Resources Team and at times, if applicable, certain members of the Executive Team. The Trustees will maintain and keep a current list of each individual authorized to have access to, or view, CORI and Other Criminal History Information. This list will be updated every six (6) months and the CORI list is subject to inspection upon request by the DCJIS.

## **III. SECONDARY DISSEMINATION LOGS**

All CORI obtained from the DCJIS is confidential and will only be disseminated as authorized by law and regulation. A “secondary dissemination log” shall be used to record any dissemination of CORI outside of the Trustees, including dissemination at the request of the individual who is the subject of the CORI.

## **IV. TRAINING**

An informed review of a criminal record requires training. Accordingly, all Trustees personnel authorized to review or access CORI or Other Criminal History Information will review, and will be thoroughly familiar with, the educational and relevant training materials regarding CORI laws and regulations made available by the DCJIS as well as federal and state laws applicable to obtaining criminal background record information through a CRA.

## **V. USE OF CRIMINAL HISTORY FOR EMPLOYMENT PURPOSES**

CORI and Other Criminal History Information used for hiring purposes will only be accessed for individuals who are

otherwise qualified for the position for which they have applied and who have received a conditional offer of employment.

Unless otherwise provided by law, a criminal record will not automatically disqualify an individual. Rather, determinations of suitability based on background checks will be made consistent with this policy and any applicable laws and regulations.

## **VI. PROCEDURES FOR CORI CHECKS**

- Each applicant, employee, volunteer, or intern will be required to complete and sign a CORI Acknowledgement Form, and a separate written authorization to conduct CORI checks through a CRA in conjunction with any application for employment, volunteer, or internship service with the Trustees. If the Trustees decides to make an offer of employment or volunteer service, or approves the individual for service as an intern, such offer or approval is expressly conditioned upon receipt of a satisfactory CORI Report, as determined in the sole discretion of the Trustees.
- Employees, volunteers, and interns may also be required to complete and sign a CORI Acknowledgement Form, and a separate written authorization to conduct CORI checks through the CRA on a periodic basis and no less than every three years. In the case of camp employees and volunteers, CORI screening will be conducted on an annual basis. This form must be completed within three (3) business days following receipt of the form. Continued employment or volunteer or internship service is expressly conditioned upon receipt of a satisfactory CORI check, as determined in the sole discretion of the Trustees.
- The Trustees will send a request for CORI directly, and also through a CRA, to the DCJIS. CORI Reports are available online and are usually available immediately after the request is made.
- If a criminal record is received from the DCJIS, the information will be closely compared with the information on the CORI Acknowledgement Form and any other identifying information provided by the individual, to ensure that the criminal record belongs to the individual.

If the information in the CORI record provided does not exactly match the identification information provided by the individual, a determination will be made, by an individual authorized to make such determinations, based on a comparison of the CORI record and documents provided by the individual.

- If a determination is made that the criminal record belongs to the applicant, employee, volunteer, or intern, then a determination of suitability for the position will be made by the Trustees. In determining whether an individual's CORI Report is acceptable, the Trustees will consider applicable laws and regulations and the nature of the conviction and/or pending charge information. A conviction or pending charge for certain offenses may result in disqualification from employment, volunteer, or internship service with the Trustees, as determined within the sole discretion of the Trustees.
- For Applicants, Employees, and Volunteers: If the Trustees is inclined to: (1) rescind an offer of employment or volunteer service based on information contained in a CORI Report, (2) terminate the employment or volunteer service of a current employee or volunteer based on information contained in a CORI Report, or (3) question an applicant, employee, or volunteer regarding his or her CORI Report, the Trustees will first:
  - Notify the applicant, employee, volunteer, or intern of the potential adverse decision based on the CORI Report;
  - Provide a copy of the CORI Report to the applicant, employee, volunteer, or intern which shall include the source of the CORI Report;
  - Provide a copy of the applicant's, employee's, volunteer's or intern's consumer report, a copy of A Summary of Your Rights Under the Fair Credit Reporting Act ("FCRA"), and a Pre-Adverse Action letter, if the CORI Report was obtained through the CRA;
  - Provide a copy of the Trustees' Criminal Background Check Policy to the applicant, employee, volunteer, or intern;
  - Provide a copy of the DCJIS "Information Concerning the Process in Correcting a Criminal Record" to the applicant, employee, volunteer, or intern;
  - Inform the applicant, employee, volunteer, or intern of the specific part of the CORI that appears to make the applicant, employee, volunteer, or intern ineligible for employment or volunteer service;
  - Provide the applicant, employee, volunteer, or intern with an opportunity to dispute the accuracy and relevance



of the CORI Report, including whether the CORI Report relates to the specific applicant, employee, volunteer, or intern;

- Consider the factors identified in the Suitability Factors section below in determining suitability for employment, or volunteer service;
- Upon receipt of additional documentation from the applicant, employee, volunteer, intern and/or the DCJIS, review the information with the applicant, employee, volunteer, or intern and inform the applicant, employee, volunteer, or intern of the Trustees' final decision in a timely manner. If CORI Report was obtained through the CRA, the individual will be provided with a Notice of Adverse Action; and
- Document all steps taken to comply with this regulation.

#### **PROCEDURES FOR OTHER CRIMINAL HISTORY INFORMATION CHECKS**

- Each applicant, employee, volunteer, or intern will be required to complete and sign a Consumer Report Disclosure and Authorization Form, Consumer Report Release Form, and will receive from the Trustees a Summary of Rights under the Fair Credit Reporting Act ("FCRA") in conjunction with any application for employment, volunteer, or internship service with the Trustees.
- Once a conditional offer of employment, volunteer service or internship has been made to the applicant, employee, volunteer, or intern, the Trustees will request the CRA to run Other Criminal History Information checks on them.
- If an Other Criminal History Information check reveals a criminal record, the criminal record information will be closely compared with the identifying information provided by the individual to ensure the record belongs to the individual. If the information in the criminal background record does not exactly match the identification information provided by the individual, a determination is to be made by an individual authorized to make such determinations based on a comparison of the criminal background record and documents provided by the individual.
- For Applicants, Employees, and Volunteers: If the Trustees is inclined to: (1) rescind an offer of employment or volunteer service based on information contained in Other Criminal History Information, (2) terminate the employment or volunteer service of a current employee or volunteer based on information contained in Other Criminal History Information, or (3) question an applicant, employee, or volunteer regarding his or her Other Criminal History Information, the Trustees will first:
  - Provide a copy of Other Criminal History Information to the applicant, employee, volunteer, or intern which shall include the source of Other Criminal History Information;
  - Provide a copy of the applicant's, employee's, volunteer's or intern's consumer report, a copy of A Summary of Your Rights Under the Fair Credit Reporting Act, and a Pre-Adverse Action Letter;
  - Provide a copy of the Trustees' Criminal Background Check Policy to the applicant, employee, volunteer, or intern;
  - Provide a copy of the DCJIS "Information Concerning the Process in Correcting a Criminal Record" to the applicant, employee, volunteer, or intern;
  - Provide the applicant, employee, volunteer, or intern with an opportunity to dispute the accuracy and relevance of the Other Criminal History Information;
  - Consider the factors identified in the Suitability Factors section below in determining suitability for employment or volunteer service;
  - Upon receipt of additional documentation from the applicant, employee, volunteer, or intern, review the information with the applicant, employee, volunteer, or intern. After a reasonable period of time has passed (e.g., five business days), the Trustees will inform the applicant, employee, volunteer, or intern of the Trustees' final decision in accordance with the applicable federal and state laws. Specifically, the individual will be provided with a Notice of Adverse Action; and
  - Document all steps taken to comply with applicable federal and state laws.

#### **VIII. SUITABILITY FACTORS**

When a CORI Report or Other Criminal History Information indicates that an applicant, employee, or volunteer has a criminal record, the Trustees will consider the following factors in determining suitability for employment or volunteer service unless such determination is otherwise dictated by law.

- Relevance of the record to the position sought;

- The nature of the work to be performed;
- Time since the conviction or completion of any resulting sentence;
- Age of the individual at the time of the offense;
- Nature, seriousness and specific circumstances of the offense;
- The number of offenses;
- Whether the applicant has pending charges;
- Any relevant evidence of rehabilitation or lack thereof;
- The degree of satisfaction of any parole or probation conditions;
- The length and consistency of employment before and after the offense;
- Employment or character references and any other information regarding fitness for the particular position, as evaluated in light of Other Criminal History Information (as distinguished from the reference check conducted prior to making an offer for employment or volunteer service);
- Whether the individual presents evidence that he or she is bonded under a federal, state, or local bonding program; and
- Any other relevant information, including information submitted by the candidate or requested by the Trustees.