

# Conococheague Institute for the Study of Cultural Heritage (CI)



**CONOCOCHÉAGUE**  

---

**INSTITUTE**

## **Volunteer Manual**

As a member of CI's volunteer team, you will be expected to contribute your talents and energies to further improve the environment, quality and reputation of the organization.

This Volunteer Manual is designed to acquaint the Volunteer with CI and provide general information, and some of the policies and procedures affecting your role with us. **Each Volunteer is expected to read, understand, and comply with all provisions contained within this Manual.** CI feels the information contained within this Volunteer Manual will be useful to you in your role and will help you to know what is expected of you during your time with CI. Should you have any questions regarding the information provided within the Manual, please discuss the matter with the Executive Director, Visitor Experience Facilitator, or the CI Board of Directors

***Please Note:***

***This Volunteer Manual does not in any way; establish a contractual relationship between Conococheague Institute (CI) and a volunteer. It has been prepared purely to inform you, the volunteer, of the organization's philosophy, employment practices, and policies.***

**Some Things You Must Understand**

The policies in this Volunteer Manual are to be considered as guidelines.

- CI, at its option, may change, delete, suspend or discontinue any part or parts of the policies in this Volunteer Manual at any time without prior notice as business, employment legislation, and economic conditions dictate.
- No one other than CI's Board of Directors has the authority to alter or modify any of the policies in this volunteer Manual. Any alteration or modification of the policies in this volunteer Manual must be in writing and will be communicated to all volunteers. Any such action shall apply to existing as well as to future volunteers.
- No verbal statement or promise by an agent of CI, past or present, may be interpreted as a change in policy nor will it constitute an agreement with a volunteer.
- This Manual is severable and in the event that any one or more of the provisions hereof shall be deemed invalid, illegal, or non-enforceable in the future, the validity, legality, enforceability of the remaining provisions contained herein shall not in any way be affected or impaired thereby.

**This volunteer Manual replaces (supersedes) any and all other or previous CI volunteer Manuals, or other CI policies whether written or oral.**

## Receipt and Acknowledgment of CI Volunteer Manual

*Please read the following statements, sign below and return to CI's Visitor Experience Facilitator or Board HR Liaison*

This is to acknowledge that I have received a copy of the Conococheague Institute volunteer Manual. I will immediately familiarize myself with the information in this Manual/handbook.

If I have any questions or if there are parts of the Manual that I do not understand, I will immediately seek clarification from the CI staff.

This Manual is not all-inclusive. It outlines the volunteer relationship and benefits existing at the time the Manual was prepared and is subject to modification without prior notice.

### **Confidential Information**

I am aware that during the course of my volunteering and as a result of my work with CI, I may become aware of confidential information relating to community partners, financial information, personnel information or information regarding the prospective business of CI. I understand that this information is proprietary and critical to the success of CI and must not be given out or used outside of CI 's premises or with non- CI volunteers. In the event of termination of volunteer status, whether voluntary or involuntary, I hereby agree to immediately return to CI any confidential information in my possession. I further agree not to disclose any confidential information to any other individual or company.

### **Acknowledgement**

I acknowledge that I have received this volunteer Manual and understand that it is my responsibility, as a condition of employment, to read and comply with the policies contained within this Manual and any revisions made to it at a future date.

Volunteer's Printed Name:

---

Volunteer's Signature:

---

Parent or Guardian Signature (applicable if volunteer is under the age of 18):

---

# **An Overview of CI**

## **CI's Mission**

*Conococheague Institute serves as a regional center to develop and foster awareness, understanding, and stewardship of the cultural and natural history of the Appalachian frontier of Pennsylvania, Maryland, and Virginia.*

## **Goals of Conococheague Institute**

- The Institute strives to achieve its mission through education, interpretation, research, and preservation.
- CI strives to further its mission by seeking and building affiliations with local and national historical organizations and genealogy groups.
- Maintain a fiscally responsible organization.

## **I. Equal Employment Opportunity**

### **Equal Employment Opportunity Employer**

CI is an equal employment opportunity employer. Employment decisions are based on merit and business needs, and not on race, color, citizenship status, national origin, ancestry, gender, sexual orientation, age, religion, creed, physical or mental disability, marital status, veteran status, political affiliation, or any other factor protected by law. CI complies with the law regarding reasonable accommodation for handicapped and disabled volunteers.

Management is primarily responsible for seeing that CI's equal employment opportunity policies are implemented, but all members of our volunteer team share in the responsibility for assuring that, by their personal actions, the policies are effective and apply uniformly to everyone.

Volunteers with questions or concerns about any type of potential discrimination within the workplace are encouraged to bring these issues to the attention of the Executive Committee of the Board, without fear of reprisal. Any volunteer found to be guilty of engaging in any type of unlawful discrimination will be subject to corrective action, up to and including termination of Volunteer opportunities.

### **Harassment Policy**

CI intends to provide a work environment that is pleasant, professional, and free from intimidation, hostility or other offenses, which might interfere with work performance. Harassment of any sort - verbal, physical, and visual - will not be tolerated, particularly against volunteers in protected classes. These classes include, but are not necessarily limited to race, color, religion, sex, age, sexual orientation, national origin or ancestry, disability, medical condition, marital status, veteran status, or any other protected status defined by law.

### ***What Is Harassment?***

Workplace harassment can take many forms. It may be, but is not limited to, words, signs, offensive jokes, cartoons, pictures, posters, email jokes or statements, pranks, intimidation, physical assaults or contact, or violence. Harassment is not necessarily sexual in nature. It may also take the form of other vocal activity including derogatory statements not directed to the targeted individual but taking place within their hearing. Other prohibited conduct includes written material such as notes, photographs, cartoons, articles of a harassing or offensive nature, and taking retaliatory action against a volunteer for discussing or making a harassment complaint. This type of volunteer misconduct that is demeaning to another person, undermines the integrity of the employment relationship, and is strictly prohibited.

### ***What Is Sexual Harassment?***

Sexual harassment may include unwelcome sexual advances, requests for sexual favors, or other verbal or physical contact of a sexual nature when such conduct creates an offensive, hostile and intimidating working environment and prevents an individual from effectively performing the duties of their position. It also encompasses such conduct when it is made a term or condition of employment or compensation, either implicitly or explicitly and when an employment decision is based on an individual's acceptance or rejection of such conduct.

It is important to note that sexual harassment crosses age and gender boundaries and cannot be stereotyped. Among other perceived unconventional situations, sexual harassment may even involve two women or two men.

Generally, two categories of sexual harassment exist. The first, "quid pro quo," may be defined as an exchange of sexual favors for the expected improvement in your working conditions and/or compensation. The second category, "hostile, intimidating, offensive working environment," can be described as a situation in which unwelcome sexual advances, requests for sexual favors, or other verbal or physical contact of a sexual nature when such conduct creates an intimidating or offensive environment, as defined by a reasonable person. Examples of a hostile, intimidating, and offensive working environment includes, but is not limited to, pictures, cartoons, symbols, or apparatus found to be offensive and which exist in the workspace of a volunteer. This behavior does not necessarily link improved working conditions in exchange for sexual favors.

### ***Retaliation Policy***

The CI prohibits any volunteer from retaliating in any way against anyone who has raised a legitimate concern about harassment, sexual harassment, or discrimination against another individual.

### ***Complaint Procedures***

If you experience or witness sexual or other unlawful harassment in the workplace report it immediately to CI's Board President or E.D. If these people are not available or you believe it

would be inappropriate to contact that person, you should immediately contact any member of the Board of Directors' Executive Committee. You may raise concerns and make reports without fear of reprisal or retaliation. Your complaints to the designated Board of Directors' Executive Committee members or E.D should be specific and include sufficient objective data so appropriate actions may be taken.

All allegations of harassment will be quickly and discreetly investigated. To the extent possible, your confidentiality and that of any witnesses and the alleged harasser will be protected against unnecessary disclosure. When the investigation is completed, you will be informed of the outcome of the investigation. Anyone found guilty of engaging in sexual or other unlawful harassment will be subject to corrective action, up to and including termination of volunteer opportunities.

### **Background Check Policy**

As part of the new certification process, new volunteers will be required to submit copies of completed Pennsylvania State Police criminal record checks and Pennsylvania Child Welfare checks. Eligibility of the volunteer will be determined by these checks. Possession of a non-violent criminal record does not automatically make the volunteer ineligible.

CI may conduct a combination of the following checks: employment verification/references, education verification, motor vehicle report/driver's license check and national Social Security trace. The company reserves the right to run these checks at any time during the course of your volunteering for any legitimate reason that management may deem necessary.

### **New volunteer Orientation**

On your first volunteer day, you will shadow an existing certified volunteer or staff member. You will be introduced to your co-volunteers and staff and the property of CI. Please feel free to ask your colleagues any questions not answered during your orientation.

## **III. What You Can Expect From the CI**

CI believes in creating a harmonious working relationship between all volunteers. In pursuit of this goal, CI has created the following volunteer relations objectives:

1. Provide an exciting, challenging, and rewarding workplace and experience.
2. Select people on the basis of skill, training, ability, attitude, and character without discrimination with regard to age, sex, color, race, creed, national origin, religious persuasion, marital status, political belief, or a disability that does not prohibit performance of essential job

functions.

3. Take prompt and fair action of any complaint, which may arise, in the everyday conduct of our business, to the extent that is practicable.
4. Respect individual rights, and treat all volunteers and customers with courtesy and consideration.
5. Maintain mutual respect in our working relationship.
6. Provide buildings and offices that are comfortable, orderly and safe.
7. Keep all volunteers informed of the progress of CI, as well as the company's overall goals and objectives.
8. Promote an atmosphere in keeping with CI's mission and goals.

## **IV. What CI Expects from You**

### **Standard of Conduct**

By accepting to volunteer with us, you have a responsibility to CI and to your fellow volunteers to adhere to certain rules of behavior and conduct. The purpose of these rules is not to restrict your rights, but rather to be certain that you understand what conduct is expected and necessary. When each person is aware that she/he can fully depend upon fellow workers to follow the rules of conduct, our organization will be a better place to work for everyone.

CI needs your help in making each working day enjoyable and rewarding. Your first responsibility is to know your own duties and how to do them promptly, correctly and pleasantly. Secondly, you are expected to cooperate with management and your fellow volunteers and to maintain a good team attitude.

How you interact with fellow volunteers and those whom CI serves, and how you accept direction can affect the success of this organization. Consequently, whatever your position, you have an important assignment: perform every task to the very best of your ability.

Remember, you help create the pleasant and safe working conditions that the CI intends for you. The result will be better performance for the company overall, and personal satisfaction for you.

### **Business Conduct and Ethics Policy**

CI is an organization of high integrity and personal commitment. One of the CI's most valuable assets is its reputation for fairness and integrity in its relations with volunteers, community partners, advertisers, visitors, suppliers, government agencies, and all others with whom it deals. This reputation, which can so easily be lost, can be retained only if all volunteers

continue to adhere to the highest moral and ethical standards in the conduct of business. Among those standards:

- We will obey the law – in letter and spirit.
- We operate in accordance with CI's expectations and policies.
- We are straightforward and above board in all our relationships, and we seek long lasting relationships.
- We endeavor to deliver quality services.
- In making purchases, we seek maximum value for each dollar spent.
- We comply with generally accepted accounting principles and controls.
- We give no gifts of value and accept no gift of other than nominal value from those with whom we do business.

CI expects that all volunteers will comply with all of its policies and procedures to the extent that you are responsible for the activities of your fellow volunteers. It is everyone's obligation to see that they are adequately informed of these policies and of the importance and necessity of strictly complying with them. It is important to remember that while technologies become obsolete, equipment wears out, and fellow volunteers and customers may come and go, a good business reputation is an asset of enduring value.

## **Conflict of Interest**

Situations of actual or potential conflict of interest are to be avoided by all volunteers. Personal involvement with a competitor, supplier, or subordinate volunteer of CI, which impairs a volunteer's ability to exercise good judgment on behalf of the Company, creates an actual or potential conflict of interest. This conflict of interest may exist regardless of the volunteer's motives.

A volunteer involved in any of the types of relationships or situations described in this policy should immediately and fully disclose the relevant circumstances to the E.D or Executive Committee of the Board of Directors for a determination of the existence of a potential or actual conflict. If an actual or potential conflict is determined, CI may take whatever corrective action appears appropriate according to the circumstances.

In addition:

- Volunteers are expected to conduct their activities with the CI so that he/she does not advance or protect his/her interests, or the private interests of others with whom he/she may have a relationship in a way that is detrimental to the interests and/or mission of CI.
- In every instance in which a volunteer represents CI, he/she will conduct him/herself in a manner to best promote the interests of CI.
- Should a conflict of interest or potential conflict of interest arise, the volunteer will disclose that conflict or potential conflict to the E.D or the Board of Directors' Executive



Committee to seek a resolution of the issue.

## **Confidential Information and Non-Disclosure Agreement**

The nature of CI's business relationships requires maintenance of confidentiality. In safeguarding the information received, CI earns the respect and further trust of our community partners, advertisers, visitors and suppliers.

During your period of volunteering and as a result of your work with CI, you may become aware of confidential information relating to community partners, financial information, intellectual property developed by CI volunteers, personnel information or information regarding the prospective business of CI. Every volunteer must recognize such information to be the property of CI and agree to hold such information in trust and solely for the benefit of CI and not to disclose such information outside its necessary application.

If you are questioned by someone outside CI and you are concerned about the appropriateness of giving him or her certain information, do not answer. Instead, as politely as possible, refer the request to the CI Manager or Executive Committee of the Board of Directors.

No one is permitted to remove or make copies of any CI records, confidential reports or documents (outside of promotional materials) without prior management approval. In the event of termination of employment, whether voluntary or involuntary, you may not utilize or exploit any CI/client confidential information with any other individual or organization.

Disclosure of confidential information could lead to termination, as well as other possible legal action.

In the event of termination of volunteer status, whether voluntary or involuntary, I hereby agree to immediately return to my manager/Executive Committee any confidential information in my possession. I further agree not to disclose any confidential information to any other individual or company.

## **Customer Relations**

The success of the CI depends upon the quality of the relationships between CI, our volunteers, community partners, advertisers, visitors, suppliers, public agencies as well as the general public. People's impression of the CI and their interest and willingness to work with us is greatly formed by the individuals who serve them. In a sense, regardless of your position, you are CI's ambassador. The more goodwill you promote, the more people will respect and appreciate you, CI, and CI's services.

Below are several things you can do to help provide the public with a good impression of the CI. These are the building blocks for our continued success.

1. Act competently and deal with volunteers, community partners, advertisers, visitors, suppliers, public agencies as well as the general public in a courteous and respectful manner.
2. Communicate pleasantly and respectfully with other volunteers at all times.
3. Follow up on orders and questions promptly, provide businesslike replies to inquiries and requests, and perform all duties in an orderly manner.
4. Take great pride in your work and enjoy doing your very best.

## **Code of Conduct**

CI believes in maintaining a business environment that promotes professionalism in all personal contacts whether they are with CI staff, community partners, advertisers, suppliers or the general public. Conduct that interferes with the business operations, or discredits the company is unacceptable. Volunteers are expected to conduct themselves in a positive manner to promote the best interests of the organization.

Set forth below is a non-exhaustive list of serious infractions that may result in corrective action. However, this list is not all-inclusive and CI retains the right and responsibility to counsel and discipline volunteers, as it deems necessary and appropriate.

## **Unacceptable Actions and/or Behaviors:**

- Violation of any company rule; any action that is detrimental to CI's efforts to operate profitably.
- Violation of security or safety rules, or negligence or any careless action, which endangers the life or safety of another person.
- Being intoxicated or under the influence of a controlled substance while at work; use, possession or sale of a controlled substance in any quantity while on CI premises, except medications prescribed by a physician which do not impair work performance.
- Unauthorized possession of dangerous or illegal firearms, weapons or explosives on company property or while on duty. Engaging in criminal conduct or acts of violence or making threats of violence toward anyone on company premises or when representing CI; fighting, or provoking a fight on company property, or negligent damage of property.
- Threatening, intimidating or coercing fellow volunteers on or off the premises at any time, for any purpose.
- Engaging in an act of sabotage; negligently causing the destruction or damage of company property, or the property of fellow volunteers, community partners, advertisers, suppliers, or visitors in any manner.
- Theft or unauthorized possession of company property or the property of fellow

volunteers; unauthorized possession or removal of any company property, including documents, from the premises without prior permission from the manager or Executive Committee of the Board of Directors; unauthorized use of company equipment or property for personal reasons; using company equipment for profit.

- Dishonesty; falsification or misrepresentation on your application for volunteering or other work records; falsifying reason for a leave of absence or other data requested by CI; alteration of company records or other company documents.
- Violating the non-disclosure agreement; giving confidential or proprietary CI information to competitors or other organizations or to unauthorized CI volunteers; working for a competing entity while an CI volunteer; breach of confidentiality of personnel information.
- Spreading malicious gossip and/or rumors; engaging in behavior which creates discord and lack of harmony; interfering with another volunteer on the job; restricting work output or encouraging others to do the same.
- Any act of harassment, sexual, racial or other.
- Excessive use of company telephone for personal calls.
- Smoking in restricted areas or at non-designated times, as specified by department rules.
- Creating or contributing to unsanitary conditions.
- Excessive absence or lateness.
- Obscene or abusive language toward any volunteer, community partner, advertiser, supplier or visitor; indifference or rudeness towards any manager, volunteer, community partner, advertiser, supplier or visitor; any disorderly/antagonistic conduct on company premises.
- Failure to immediately report damage to, or an accident involving, company equipment.
- Violation of lawful directives (written or verbal), policy or direction given by an immediate supervisor or Executive Committee of Board of Directors, or the failure to obey any lawful or reasonable direction when such violation amounts to insubordination or serious breach of professional behavior.
- Criminal, disorderly or immoral conduct while on duty.
- The violation of policies or directives of CI Board of Directors.

## **V. Corrective Actions**

**CI reserves the right to discharge any volunteer for any of the above infractions.**

## **VI. Personnel Records and Administration**

Volunteer information will be retained within a secure environment and maintained in an accurate and current state.

Personnel files are the property of the CI and access to the information they contain is restricted. Only designated personnel or designated Board members who have a legitimate reason to review information in a file are permitted to do so. You or your designated agent may see information, which is kept, in your own personnel file, upon written request, during regular working hours. You may request and receive copies of all documents you have signed. Former volunteers may also obtain a copy of all documents signed by the ex-volunteer contained within the personal file, upon request.

## **VII. Safety**

### **General Volunteer Safety**

CI is committed to the safety and health of all volunteers and recognizes the need to comply with regulations governing injury and accident prevention and volunteer safety. Maintaining a safe work environment, however, requires the continuous cooperation of all volunteers.

Our intention is to ensure each job is designed to facilitate an optimum combination of comfort, safety and productivity. To do this, we will continually monitor and adjust, as needed, the tools, materials, processes, environment, workers and the tasks themselves.

Every volunteer of CI has a responsibility to adhere to rules and procedures established for safety. Volunteers are expected to bring to the attention of your manager or Executive Committee of CI Board any practice or condition which they feel may pose a hazard to themselves or others.

If you are ever in doubt about how to safely perform a job, it is your responsibility to ask and clarify with the Executive Director, Visitor Experience Facilitator, or Executive Committee of CI Board.

### **Under Age Volunteers**

To ensure the safety and productivity of those onsite, volunteers under the age of 16 must have a parent or guardian on-site during the duration of their volunteer time.

### **Housekeeping**

It is important to keep the grounds and work areas of CI orderly. As well, it is a safety precaution.

Keep aisles, stairways, exits, electrical panels, fire extinguishers, and doorways clear at all times.

The exterior of CI is the first impression of those visiting at CI Please put all litter in the appropriate receptacles. Strive to maintain a neat and historically appropriate appearance. Always be aware of good health and safety standards, including fire and loss prevention.

If you use a space or equipment, please leave it as you found it (or better) for the next person to experience.

Please report anything that needs repairing or replacing.

## **Security**

Maintaining the security of the CI buildings and grounds is every volunteer's responsibility. Develop habits that ensure security as a matter of course.

## **Violence in the Workplace Policy**

CI strives to provide a safe workplace for all volunteers. In accordance with that goal, CI has adopted a “no tolerance” stance in regards to workplace violence. This stance further strengthens the commitment to provide a work environment free from harassment of any kind.

Workplace violence is defined as any threat or act meant to intimidate or harm any fellow volunteer, vendor, or visitor, or any act intended to cause damage to CI property or product. Having an unauthorized firearm on one’s person that is not cleared with the site designated weapons safety officer is also considered a violation of this policy. While in most cases the behavior of concern will likely have occurred on CI premises, instances of violent behavior away from the workplace or during off-hours may be addressed if management deems appropriate. Volunteers are responsible for understanding the policy and the consequences of the violation. They also are required to report any workplace violence situations.

## **Workplace Searches**

All work areas provided for volunteer use remain the property of CI. As such, CI reserves the right to search such areas at its discretion with or without prior notice.

## **Security Philosophy Statement & Principles**

CI recognizes the need to protect its assets – people, property, and information. Although the Company is responsible for developing common sense security programs, all volunteers have the responsibility to safeguard the assets of CI.

## **Security Principles:**

- **Company Assets** – CI believes that the protection of company assets (people, property, and information) is a condition of volunteering and is the responsibility of all volunteers.
- **Volunteer Conduct** – volunteers are required to respect CI property, the individual rights, privacy and property of others, and to treat information with the confidentiality that it deserves.
- **Proprietary Information** – volunteers are required to protect proprietary information to ensure CI's competitive position in the marketplace. Proprietary information means any plans, ideas, or data CI would not want a competitor or the general public to know.
- **Electronic Information** – volunteers who manage and have access to CI computer/electronic information systems are responsible to protect all the information on that system, or on any systems connected to it and on the methods of accessing such systems.

### **Proprietary Information Protection**

Proprietary information is any informational material, which is owned by CI, or entrusted to CI, which requires protection against unauthorized disclosure and has been so designated. It is to be used only for authorized CI business purposes.