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Fecha: _____

Conflict of Interest Policy

1. Purpose

The purpose of this Conflict of Interest Policy ("Policy") is to protect this tax-exempt Corporation's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Corporation or might result in a possible excess benefit transaction. This Policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

2. Definitions

- a. **Interested Person.** Any director, principal officer, or member of a committee with governing board-delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.
- b. **Financial Interest.** A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
 - i. An ownership or investment interest in any entity with which the Corporation has a transaction or arrangement;
 - ii. A compensation arrangement with the Corporation or with any entity or individual with which the Corporation has a transaction or arrangement; or
 - iii. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Corporation is negotiating a transaction or arrangement.
- c. Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.
- d. A financial interest is not necessarily a conflict of interest. In accordance with this Policy, a person who has a financial interest shall have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

3. Procedures

- a. **Duty to Disclose.** In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board-delegated powers considering the proposed transaction or arrangement.

- b. **Determining Whether a Conflict of Interest Exists.** After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

- c. **Procedures for Addressing the Conflict of Interest.**
 - An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
 - ii. After exercising due diligence, the governing board or committee shall determine whether the Corporation can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.
 - iii. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Corporation's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

- d. **Violations of the Policy.**
 - i. If the governing board or committee has reasonable cause to believe a person has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
 - ii. If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

4. Records or Proceedings

The minutes of the governing board and all committees with board-delegated powers shall contain:

- a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.

- b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

5. Compensation

- a. A voting member of the governing board who receives compensation, directly or indirectly, from the Corporation for services is precluded from voting on matters pertaining to that member's compensation.
- b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Corporation for services is precluded from voting on matters pertaining to that member's compensation.
- c. No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Corporation, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

6. Annual Statements

Each director, principal officer and member of a committee with governing board-delegated powers shall annually sign a statement which affirms such person: ¹

- a. Has received a copy of the Policy,
- b. Has read and understands the Policy,
- c. Has agreed to comply with the Policy, and
- d. Understands the Corporation is charitable and in order to maintain its federal tax exemption it must engage primarily in activities that accomplish one or more of its tax-exempt purposes.

7. Periodic Reviews

To ensure the Corporation operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- a. Whether compensation arrangements and benefits are reasonable, based on competent survey information and the result of arm's length bargaining.
- b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the Corporation's written policies, are properly

recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

8. Use of Outside Experts

When conducting the periodic reviews as provided for in Article 7, the Corporation may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

Conflict of Interest Disclosure Form

Name: _____

Date: _____

Please describe below any relationships, positions or circumstances in which you are involved that you believe could contribute to a Conflict of Interest as defined in the Bay Area Service League's Conflict of Interest Policy.

I hereby certify that the information set forth above is true and complete to the best of my knowledge. I have reviewed, and agree to abide by, the Conflict of Interest Policy of Bay Area Service League that is currently in effect.

Signature: _____

Date: _____

SOCIAL MEDIA & COMMUNICATIONS POLICY

1. This policy governs the publication of and commentary on social media by members of Bay Area Service League. For this policy, social media means any facility for online publication and commentary, including, without limitation, blogs, websites, and social networking sites such as Facebook, LinkedIn, Twitter, Pinterest, Instagram, and YouTube.
2. Bay Area Service League members are expected to uphold and promote the mission and vision statements of the organization and adhere to all established policies.
3. Bay Area Service League members are free to publish or comment via social media under this policy. Organization members are subject to this policy to the extent they identify themselves as a member (other than as an incidental mention of place of volunteerism in a personal blog on topics unrelated to Bay Area Service League).
4. Publication and commentary on social media carry similar obligations to any other kind of traditional written or spoken publication or commentary. All uses of social media must follow the same code of ethics that Bay Area Service League members must otherwise follow.
 - a. Social media accounts for the organization shall be set up only by the chapter Marketing Chair as authorized by the organization the Guidelines for Social Media Administrators.
 - b. All posts and comments shall comply with the organization's code of ethics and all other established policies.
 - c. All posts and comments shall pertain to the organization and shall not promote other organizations or businesses' fundraising initiatives, unless the other organization or business has selected by Bay Area Service League as the recipient of the fundraising initiative
 - d. Avoid "organizational-speak" by not using words or acronyms the average reader would not understand.
 - e. All organization social media postings shall portray the organization and/or corporation professionally. **Use common sense.**
 - f. Refrain from posting items that could reflect negatively on Bay Area Service League or otherwise embarrass the organization. Social media posts are widely accessible and will be around for a long time, so consider the content carefully. Google has a long memory.
 - g. Refer negative comments or posts found on organization social media sites to the organization's Marketing Committee/Social Media Administrator. Do not respond or engage in dialogue about such posts.
 - h. Be transparent when posting or commenting as a representative of Bay Area Service League, disclose your name and the fact that you are a member/volunteer of the organization.
 - i. Use disclaimers. When posting or commenting in a capacity unrelated to the organization, make clear that any statements made are solely your own and do not represent the opinions or viewpoints or official policies of Bay Area Service League
 - j. Be accurate and correct any mistakes as soon as possible. Be considerate. Post meaningful, respectful comments.
 - k. Do not publish the organization's (or anyone else's) confidential information. Confidential information includes things such as unpublished details of projects,

members' personal information, and items not yet approved by the membership.

5. All members must have the Consent Regarding Photographs form and a social media policy agreement signed annually.

WHISTLEBLOWER PROTECTION POLICY

Introduction

The Code of Ethics adopted by Bay Area Service League requires all members and volunteers (include employees if applicable) to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. As members and volunteers of Bay Area Service League, we must practice honesty and integrity in fulfilling our responsibilities and comply with all applicable laws and regulations. Set forth below is the organization's policy for reporting good-faith concerns about the legality or propriety of actions or plans of Bay Area Service League or its board members, members or volunteers.

Reporting of Concerns or Complaints

It is the responsibility of all board members, members and volunteers to comply with Bay Area Service League's Code of Ethics and applicable law and to report violations or suspected violations under this Whistleblower Policy.

Confidentiality

Bay Area Service League will treat all communications under this policy in a confidential manner, except to the extent necessary 1) to conduct a fair investigation, or 2) for review of organization operations, independent public accountants, and legal counsel.

Retaliation

The organization will not permit any negative or adverse actions to be taken against any employee or individual for making a good-faith report of a possible violation of its Code of Ethics or applicable law, even if the report is mistaken, or against any individual who assists in the investigation of a reported violation. Retaliation in any form will not be tolerated. Any act of alleged retaliation should be reported immediately and will be promptly investigated. An individual who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of volunteer status (or employment). This Whistleblower Policy is intended to encourage and enable members, volunteers, (employees) and others to raise serious concerns within the organization before seeking resolution outside the organization.

To Report Concerns or Complaints

Any individual may communicate suspected violations of the Code of Ethics, applicable law, or other wrongdoing or alleged retaliation by contacting an officer of the board of Bay Area Service League. Legal Counsel will then be contacted for direction. It is not necessary that you give your name or position in any notification. Whether or not you identify yourself, for a proper investigation to be conducted, please provide the organization with as much information as you can, sufficient to do a proper investigation, including where and when the incident occurred, names and titles of the individuals involved, and as much other detail as you can provide.

Questions

If you have any questions regarding this policy, please contact the President of Bay Area Service League.

My signature below indicates my receipt and understanding of this Policy. I also verify that I have been provided with an opportunity to ask questions about the Policy.

Member Signature

Date

**Bay Area
Service League
Protected Persons Behavioral and Reporting Policy**

Adopted May 22, 2025

Purpose:

It is the purpose of this policy of Bay Area Service League to provide a safe and secure environment for children, persons with intellectual disabilities, and elderly persons who participate in activities sponsored by Bay Area Service League. This policy is intended to formalize Bay Area Service League's commitment to the avoidance of abuse to such Protected Persons.

Scope:

This policy shall apply to all current and future Bay Area Service League employees, Members and/or volunteers, including all Advisory Council Members.

Definitions:

For the purpose of this policy the following definitions shall apply:

1. "Abuse" shall be defined as verbal, physical, emotional, or sexual abuse and/or exploitation and neglect of a Protected Person, which thus includes child abuse, abuse of persons with intellectual disabilities, and elder abuse.
2. "Adult" shall be defined as any individual at least eighteen (18) years of age.
3. "Advisory Council Member" shall be defined as any individual invited by the Board to serve on an annual basis.
4. "Child," "children" and/or "minor" shall be defined as any individual under the age of eighteen (18) years of age, including Minor Member Volunteers.
5. "Community Volunteer" shall be defined as any individual, other than a Member Volunteer or Advisory Council Member, performing services for Assistance League without compensation.
6. "Elderly Persons" shall be defined as any individual sixty-five (65) years of age and older.
7. "Employee" shall be defined as any individual performing services for Assistance League for compensation, including independent contractors and employees.
8. "Member Volunteer" shall be defined as any individual who is listed on the official rolls of the organization members maintained annually by Bay Area Service League.
9. "Minor Member Volunteers" shall be defined as any individual under the age of eighteen (18) years of age; and listed on the official rolls of the organization's members maintained annually by Bay Area Service League. Minor Member Volunteers are sometimes referred to as Service Teens.
10. "Protected Person(s)" shall refer to children, persons with intellectual disabilities, and elderly persons.

Eligibility for Service

No individual is suitable to serve as an employee, Member, or volunteer with Bay Area Service Assistance League who has been convicted of a felony; or a misdemeanor involving sexual misconduct or moral turpitude; unless granted an exemption pursuant to the **Bay Area Service League Name-based Search Policy**.

No Community Volunteer shall be allowed to be in the presence of a Protected Person unless under the direct supervision of a Member Volunteer or Employee.

Specific Acts and Omissions in Violation of this Policy:

The following acts or omissions are violations of this Policy and will not be tolerated or accepted during any activity or program and are to be immediately reported after the safety of the Protected Person has been assured.

1. Any direct observations or evidence of sexual advances and/or sexual activity in the presence of or in association with a Protected Person.
2. Any display or demonstration of sexual advances and/or sexual activity, abuse, insinuation of abuse, or evidence of abusive conduct towards a Protected Person.
3. Sexual advances and/or sexual activity of any kind between any person and a Protected Person.
4. Infliction of physically abusive behavior or bodily injury to a Protected Person.
5. Physical neglect of a Protected Person including failure to provide adequate supervision.
6. Mental or emotional injury to a Protected Person.
7. The presence and/or possession of obscene or pornographic materials.
8. The possession of and/or being under the influence of any illegal or illicit drugs.
9. The consumption of and/or being under the influence of illegal or illicit drugs, marijuana, or alcohol while leading a function with a Protected Person or Minor Volunteer Member.

Adult Behavior:

1. For Protected Persons *not including* elderly persons:
 - a. No adult employed by or volunteering for Bay Area Service League shall be left alone with a Protected Person. This will require a reasonable ratio of adults to Protected Persons be maintained in each situation involving the supervision of Protected Persons. For elderly persons, see 2a below.
 - b. In guidance and/or advisory sessions, written parental or guardian permission shall be obtained prior to a meeting privately with a Protected Person. If written permission is granted two adults shall be present during the guidance and/or advisory session. Prior written permission may be granted by parents to cover a specific time period (i.e., an organizational fiscal year). For elderly persons, see 2b below.
2. For elderly persons:
 - a. One-on-one Interactions between Bay Area Service League employees and/or volunteers and elderly persons that fall within the scope of Bay Area Service League sponsored activities are permitted.
 - b. In guidance and/or advisory sessions, including those involving financial advice or financial matters, two adults shall be present during the guidance and/or advisory session in addition to the elderly person.

3. For Bay Area Service Teens' events, or any event involving Minor Member Volunteers, and conferences a one (1) to ten (10) ratio of Adult to Service Teens shall also be maintained. In the event of an service Teens overnight event at least one adult of each gender shall be present if male and female Service Teens are participating.

Abuse Reporting:

1. Upon the first suspicion of an instance of abuse of a Protected Person, the Board shall be notified and take the following steps immediately:
 - a. Do not treat the suspicion as frivolous.
 - b. Commence the investigation immediately and conclude it as soon as possible.
 - c. Maintain confidentiality of the investigation as much as possible. Emphasize confidentiality of the victim and any accused.
 - d. Determine what legal requirements exist regarding reporting of abuse and make required reports to local law enforcement and/or child protective services. Even if there is no legal obligation to report, consider the specifics of the accusation and determine if a report should be made.
 - e. Cooperate fully with law enforcement officials.
 - f. Suspend any accused from the performance of duties involving Protected Persons until the investigation has been completed.
 - g. Inform the victim and the victim's family of the steps that are being taken and continue to keep them advised of the status of the investigations. If abuse of a Protected Person is confirmed, ask the victim and the victim's family what action they would like to take in the matter, and fully cooperate to address their requests while ensuring that the request is legally appropriate and prudent.
 - h. Inform the President of Bay Area Service League that an investigation is in progress.
2. In instances where abuse of a Protected Person is confirmed, Bay Area Service League shall immediately dismiss the individual if an employee. If the individual is a Member, they shall be barred from any further service with Bay Area Service League.
3. In instances where the evidence is inconclusive, Bay Area Service League will determine what action, if any, shall be taken depending on the strength of the evidence available. The accused shall be given the right to a hearing by the Board which shall issue a ruling, in writing, setting forth the findings and orders with regard to future service, and limitations on such service. The ruling of the Board shall be deemed final.
4. Bay Area Service League shall immediately contact its insurance company to report the occurrence and may contact its attorney.
5. All Bay Area Service League employees and volunteers are instructed to read and abide by this policy. They are required to notify the President in the event of observation of, or allegations of, abuse of a Protected Person.

6. Fully comply with the federal, state and local statutes regarding the reporting of abuse of Protected Persons.

Any person having cause to believe that a Protected Person's physical or mental health or welfare has been or may be adversely affected by abuse or neglect shall report the person's belief in accordance with this procedure.

I, **[name of member]**, have carefully read the foregoing Protected Persons Behavioral and Reporting Policy. I know the content thereof; and sign this policy as my own free act.

Name Printed:

Signature:

Date of Signature:

* * *