



## **Volunteer Service Policy**

Participation as a volunteer member on a COPAA Committee provides an opportunity for members to network with peers and serve the profession by working on various interesting and worthwhile assignments. Acceptance and ultimate participation on COPAA Committee entails a responsibility to assist in achieving the objectives of the volunteer group through preparation for, and attendance at, its meetings and participating in its deliberations. We know that volunteers have many demands on their time. We appreciate your willingness to use part of that time to serve COPAA. We hope you benefit as much by your volunteer service as COPAA benefits from having members willing to volunteer.

### **COPAA Volunteer Service Policy**

#### **Confidentiality.**

During the course of service as a member of a Committee, members may have access to, or receive, information which is proprietary or confidential. Such information includes, but is not limited to; trade secrets, customer, employee or member data, information related to the operations or plans of COPAA or of firms, companies or individuals doing business with COPAA which is otherwise personal, private or of a sensitive nature. Volunteers should consider all information received or discussed during their service as confidential and members may not disclose any such information without express permission from the Committee Chair and Executive Director.

#### **Conflict of Interest.**

Volunteer members agree to protect COPAA's interests during a specific committee or workgroup assignment, free of conflict of interest or self-dealing; and will act in good faith; with the care an ordinarily prudent Volunteer would exercise under similar circumstances. A Volunteer will disclose the Committee Chair(s) and Executive Director any potential conflict of interest. Conflicts of interest would include when a Volunteer has a financial interest in any transaction, contract, or other business arrangement with COPAA; or with an entity or individual whose business or operation has been or will be directly affected by or in conflict with a decision or action of COPAA.

#### **Communications.**

All statements concerning policy or technical matters issued on the authority of volunteer Committees or Workgroups should be clearly identified as such. Pronouncements and outside communications of COPAA must be approved via the Communications Policy prior to issuance.

**Actions Which May Discredit COPAA.**

Volunteer members should not engage in, promote, or participate in any activities which would reasonably be anticipated to discredit or result in damage to the COPAA's reputation or otherwise discredit the core standards and principles it represents.

**Volunteer Relations.**

Procedures are needed to in any organization to guarantee fairness and consistency in the treatment of individuals and in the conduct of good relations, to promote good management and to assist COPAA to operate effectively. Volunteers are appointed according to the criteria defined. If there are concerns about volunteers' conduct, it is first raised with the Committee Chair. After an initial review and discussion with the volunteer, the Committee Chair will discuss with COPAA Executive Director and jointly decide whether the volunteer's conduct is something that can be improved or if the volunteer or COPAA can no longer honor the Volunteer Agreement.

The Committee Chair and Executive Director will write to the volunteer within ten business days to explain what the decision is and any relevant explanation; copied to the Executive Committee. An appeal against the Committee Chair and Executive Director decision should be made in writing within ten business days to the COPAA Chair. Within two weeks, the COPAA Chair will investigate and discuss the situation (as deemed necessary) and will reply to the volunteer in writing. The COPAA Chair decision is final.

**Terminating the Volunteer Agreement.**

Apart from terminating a volunteer agreement due to competency or disciplinary action, volunteers should provide adequate notice for the termination of their work at COPAA. Volunteers who leave COPAA for any reason will be invited to an exit interview. This procedure is designed to help improve the support given to volunteers and to record their achievements and provide vital statistical information.

**Service Policy Statement.**

As a requirement of COPAA for Volunteer Committee Work (includes Committees, Subcommittees, Boards, Panels, Expert Panels, Centers, Technical Resource Panels and Task Forces) volunteers have the responsibility to review and adhere to the Volunteer Service Policy.