


# Rules and Regulations Policy

Heart & Soul's mission is to focus on family, health, and life goals. We raise funds to support multiple organizations for educational and extracurricular expenses. This fundraising will allow families to lessen financial burdens while pursuing educational, artistic, athletic, spiritual, behavioral, and medical patient balances.

To achieve this, we volunteer our time at local venues for donations as a way of fundraising. A variety of venues support our endeavors by allowing us to sell concessions, and potentially retail items, to patrons. Venues may include sporting or entertainment facilities such as Arrowhead Stadium and T-Mobile Center.

## 1. GOVERNING BOARD

Heart & Soul's by-laws are reviewed as needed but no less than every two years. Our positions require a two-year commitment and are designed to provide many levels of accountability with timely assistance and support to our volunteers.
Board Members in these positions are dedicated to the group by leading by example, donating their time in relation to their additional responsibilities, respectful and open to diverse opinions and new ways of operating. Board Members will attend scheduled board meetings (quarterly at minimum) and emergency meetings if necessary.

The Board consists of 4 Directors and 3 Officers with shared voting rights.

- Directors - Responsible for steering the group in ways such as maintaining legal compliance, timely financial filings, upholding the bylaws, securing contracts
- Officers - Responsible for daily operations of the organization.
  - President (Director) – General oversight of NPO/Operations *Jason Wolfe*
  - Vice President (Director) – General oversight of NPO *Hollye Gurley*
  - Chief Financial Officer (Director) – Responsible for taxes, working with accountant, and state/federal filings *Tamala Smocks*
    - Asst. Treasurer, incoming (Officer) – Responsible for posting donations *Rachel Cooney*
    - Asst. Treasurer, outgoing (Officer) – Responsible for payments to volunteers *Vanessa Robinson*
  - Secretary (Director) – Responsible for minutes and transparency to volunteers, posting financial statements yearly, representative & voice of volunteers *Stacy Taylor*
  - Communications (Officer) – Responsible for registration, email database, calendar *Danielle Plummer*

- In addition to the above positions, there will be a Scheduler for each venue. There will be someone from within the group but will not hold voting rights. We may bring on additional peripheral consultants as needed, such as legal advisers.

**2. CODE OF CONDUCT POLICY**

Our volunteer opportunities allow us to represent many parent companies. We are expected to conduct ourselves in a highly professional manner.

- Volunteers are expected to contribute their time, effort and attention to the tasks at hand. We are not there to observe the events. Volunteers are expected to be in our stands for the full duration of the stand opening and until dismissed.
- There is NO eating on the front line at any venue. Eating policies vary by venue, please consult with your scheduler. Drink cups on the front line should be limited and out of sight of customers.
- Cell phone use is NOT permitted on the front line at any venue at any time.
  - Phones should be turned on silent and put away.
  - They should never have video/TV shows/child performances on for viewing.
  - Short calls may be taken in the back or outside of the stand should time allow. You should inform the Lead and return as quickly as possible. In an emergency, notify the Lead so they can cover your position.
- Earbuds are prohibited at **ALL** times at all venues. They are a health hazard risk and potentially a rude perception to customers.
- Uniforms must always be compliant with venue standards and appearance must be professional.
  - Venue specific shirts and badges may be checked out to you, and you are responsible for returning them at end of the event/season.
  - Some venues will allow the option to purchase, and the amount will be deducted from your personal funds.
  - Failure to comply with the approved type of pants/shorts may result in being sent home with any venue incurred deductions passed on to you. (See Venue Specific Information for uniform specifics)
- Should an issue develop with a volunteer, customer, or any other personnel, inform the Lead or Assist. They can handle the situation accordingly. An email next day can be sent to communications@heartandsoulnpo.com so we may further address the issue.
  - Volunteers should **NEVER** take questions or concerns to venue representatives. This relationship is between the Lead/Directors only for various reasons and should be respected.
- All volunteers should feel comfortable, safe, and respected in our working environment. Sexual harassment or sexual misconduct of any sort is prohibited. Foul language will not be tolerated, especially on the front line.
- Violations of these rules may result in financial penalties from the venue, which will be passed on to the violator and may jeopardize our group from continuing work these venues.
- The following behaviors are strictly always prohibited and tolerated under NO circumstances. Any violations are subject to any level of the Discipline policy:
  - ❖ Use of abusive or foul language towards another volunteer or customer
  - ❖ Possession or use of alcoholic beverages, medicinal marijuana, or illegal drugs or reporting to any event under the influence of these items.
  - ❖ Possession of any dangerous or unauthorized materials such as explosives, firearms, weapons or similar items
  - ❖ Physical, verbal, or visual harassment
  - ❖ Discourtesy or rudeness to any participant or customer

- ❖ Actual or threatened violence toward any individual
- ❖ Conduct endangering the life, safety, health or well-being of others or the venue
- ❖ Bullying
- ❖ Theft of any kind
- ❖ Failure to cooperate with any Board member/Lead/Assist or venue supervisor

**3. SCHEDULING POLICY**

Volunteers must register on the Heart & Soul website. Volunteer information such as phone numbers, address, and email address will be stored.

- The Sign Up is unlocked about 2 to 3 weeks before months end for the upcoming month's events.
- Each volunteer is required to have their own Gmail address. This helps our Schedulers ensure accurate counts and that all volunteers receive the event specific information.
- Volunteers should **NOT** double book themselves. Should this happen, cancellation fees and any incurred venue deductions will be passed to the volunteer account.
- Volunteers should avoid signing up for all events and then removing themselves later.
  - This can lead to double bookings, limited sign-up options or inflated volunteer numbers.
  - Should Schedulers find this to be an issue with specific individuals, deductions or disciplines may incur.
- All requests to volunteer/scheduling correspondence must be via Sign-up to the correct Scheduler listed on the Contact Info tab on the web site.
  - Texting, Facebook messaging, etc., is not permitted for documentation purposes.
  - Comments may be added via Sign-up. These should be minor comments. Anything lengthy should be addressed via email with the Scheduler.
    - ❖ Within reason, Schedulers will do their best to accommodate special requests but there are no guarantees. It is not always possible for all requests to be met.
  - Emergency cancellations should be communicated to the scheduler with a phone call with confirmation from the scheduler.
- Positions and venue information will be listed in a confirmation email sent prior to the event.
- Scheduling assignments will be rotated as needed. We try to maintain consistency and experience yet offer opportunities for change.
- Backups are expected to be able to work up until the last minute but are not guaranteed to work. If you are no longer available to be on reserve, you should notify the Scheduler and asked to be removed. If this is done at the last minute, cancellation fees could be incurred.
- Anyone who holds a leadership role with a different Fundraising NPO is ineligible to volunteer with Heart and Soul.

*It is each volunteer's responsibility to ensure all licenses are current for each venue.*

**4. LEAD EXPECTATIONS**

More experienced members of the group may be designated as Lead positions. These individuals will have additional responsibilities and expectations during events. These items may include, but are not limited to the following:

- Earlier arrival and later dismissal time at events
- Report on any late or absent volunteers
- Accurate counting of opening inventory
- Ensuring smooth running of stand during event
- Facilitate issues with customer satisfaction
- Communication or escalation with venue supervisors
- Accurate documentation of any spoilage, employee meals, etc.
- Counting of closing inventory
- Completion of venue required paperwork
- Collecting cash donations and turning into the Treasurer
- End-of-night closing oversight to ensure all procedures are completed, cleanliness of stand, etc.
- Excellent communication skills with stand workers and ability to prioritize, make shifts in staffing needs within the stand, and assist wherever needed
- Communicating with the Treasury team to confirm all volunteers attended

**5. CANCELLATION POLICY**

We understand that sometimes things may come up beyond our control. We will work with volunteers on a case-by-case basis when this occurs. Please ensure that you respect our group like any other working commitment. If you sign up, you are committed to be there, to be on time and to be present for the duration of the event.

Should a situation arise prohibiting a volunteer from fulfilling their commitment, they need to personally contact the appropriate venue scheduler. If the venue staffing list has <u>not yet</u> been communicated via email, volunteers can reach out by comments within the event in Sign-up. If it is **<u>after</u>** the staffing list has been communicated, then communication is required to be via phone/text. *Email is not an acceptable form of communication* within the cancellation policy window.

The following deductions below will be imposed on the volunteer based on the time of the cancellation in respect to the date of the event.

- Cancellations:
  - On the day of the event, volunteers will incur a $100.00 deduction plus any applicable venue charges.
  - Within 1 day of the day of the event, volunteers will incur a $75.00 deduction plus any applicable venue charge
  - Within 2 days of the day of the event, volunteers will incur a $50.00 deduction plus any applicable venue charge
  - Within 3 days of the day of the event, volunteers will incur a $25.00 deduction plus any applicable venue charge
- No Call/No Show:
  - Volunteers that sign up for an event and fail to show up/call will incur a $100.00 deduction plus any applicable venue charge.
    - Example: $100.00 no call/no show + $75.00 from venue = $175.00 total volunteer deduction

- Late Arrivals and Leaving Early:
    - Unless an exception is arranged with the Scheduler prior to the event, anyone that arrives after the assigned check-in time may face a deduction of donations. The deduction amount will be $25 for the first 30 minutes late and then $5 for each additional 15 minutes. Those leaving early will have their donation pro-rated.
    - Volunteers may carpool to events. However, know that individuals in your group may be assigned different check-in or stand closure times. When this occurs, volunteers must plan accordingly to wait for each other. Volunteers will not be excused to leave stands early due to ride share.

**6. DISCIPLINE PROCEDURE**

Unfortunately, there are times when a volunteer's actions are non-compliant with policies and must be addressed. Typically, a verbal discussion/warning will occur resulting in the situation being resolved. In the rare instances beyond this, the Stand Lead will discuss the situation with the Directors.

The Board will then address the volunteer in the following manner:

1) A letter of warning will be issued addressing what occurred and restating future expectations.
2) Should issues occur again the result will be a Suspension. The length of the suspension can vary depending on the individual situation being addressed.
3) Should the Board deem it necessary, Termination is the last option. This could be after the above items have occurred or could be a direct result should the situation be deemed severe.
4) The Board reserves the right at any time to enforce stricter decisions based on the severity of the given situation. If the offence is deemed to be fragrant, a volunteer can be suspended or terminated as a first step.

**7. INSURANCE/WAIVER OF RESPONSIBILITY/MEDICAL RESPONSIBILITIES**

Heart & Soul does NOT provide any type of medical insurance for our volunteers. Volunteers are required to have a signed waiver on file. Should you experience an injury, or become ill, during an event, or travelling to or from the event, all responsibility will fall to the volunteer and their personal coverage. This includes all medical procedures, doctor's visits, resulting bills, etc. Should the volunteer lack medical coverage, all financial obligations are still their direct responsibility.

Volunteers must be able to perform all expected duties to full capacity without physical limitations. Should a volunteer become sick or injured outside of an event, they should immediately contact the appropriate Scheduler to cancel. A volunteer from the back-up list will be contacted as a replacement for you and deductions may be waived depending on the situation. In addition, illnesses can be easily transmissible to other volunteers and customers. It is a violation of health codes to come to an event with symptoms or having been knowingly exposed to illness. If a volunteer is sent home due to any of these reasons, deductions and discipline actions may occur.

**8. REIMBURSEMENT/ACCOUNTING POLICY**

- Payments from each venue will be combined with individual spreadsheets updated as funds are received from the venue.
- Each venue pays on different schedules which means your events may likely ***not*** post in chronological order.
- Volunteers may submit receipts for personal reimbursement. They can be uploaded via DropBox. You will be able to see which receipts have been uploaded or used once the Treasurer transfers the information your personal spreadsheet. See directions on the website.

- Reimbursement will be in the form of a physical check for most matters. This can be delivered in person or via US mail.
- If a volunteer opens an account at Community America Credit Union (can open with as little as $1) we would then have the ability to transfer funds directly to your account for free. Depending on the time of the day the request is received, these transfers can be made same day providing instant access to your funds.
- Two dollars will be deducted per person, per event from contributions as an administrative fee. These monies are applied directly towards general operating expenses incurred by Heart & Soul such as accounting, banking fees, operational applications, legal fees and postal fees/PO Box. At the end of the fiscal year (July), expenses will be reviewed with the financial reports made available.
- Unclaimed funds will be donated back to Heart & Soul after a period of 2 years of volunteer inactivity or reimbursement requests. A reminder will be sent to the volunteer one month prior to the forfeiture.
- *It is important to note, and per the waiver you sign, any receipts submitted for reimbursement are then NOT ELIGIBLE to be listed as a deduction on your taxes.*

**9. DONATIONS/DISTRIBUTION POLICY**

- All donations will be given to the main Lead at the end of the night. The Lead will turn these into the Treasury.
- *Failure to turn in all donations will be considered theft* and may result in suspension or termination.
- Each venue determines their fundraising contribution amount. Some contracts are subject to change based upon the number of volunteers/stands staffed, percentage of concession sales, etc.
- The payment model will be evaluated periodically by the Board to ensure the fairest, most efficient, model is being utilized. This is a team concept. We want to make the best model for the most people; yet we must honor the venue contracts and be able to calculate and post quickly and efficiently.
- Volunteer money distributions will follow a hybrid model. Events will ***not*** be broken down on an hourly basis. The goal of this model is to keep pay equitable to the amount of time worked - as this can vary greatly depending upon the venue.
    - Standard events are typically 5-6 hours and make up the majority of our events.
        - These events will have their venue contributions & donations combined all together (same day events only) & divided evenly by the number of volunteers.
    - Extended events span a length of time of 7 or more hours. These events require prolonged commitment to time.
        - These events will have their venue contribution and donations kept separate from pooled funds of standard events. This will be divided evenly by those volunteers that worked at the specific event only.
- On rare occasions, an unforeseen issue or delay may impact on the overall time commitment/length of an event. When this occurs the Treasury team will evaluate each unique situation, along with other events on that same day, and adjust donations to be as fair and beneficial to volunteers as possible.
- Examples follow depicting our hybrid model. These are for example only and not for accuracy. They do not represent any fees or deductions that may be deducted – including the $2/per event/per volunteer administrative fee.

# EXAMPLES ARE FICTICIOUS - NOT TRUE AMOUNTS & ONLY FOR DEMONSTRATION

- Example 1 - Only **one standard event per day**: T-Mobile concert

  Volunteer gets what the venue contributes plus donations. It is split evenly between all volunteers working that day regardless of amount of time worked.

| ONE STANDARD EVENT | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Volunteer** | **Venue** | **Venue Contribution** | **Total workers/venue** | **Total donations/venue** | **Total Venue Contribution** | **Posted Amount** | **Event Type** |
| George | TMC - Concert | $120 | 25 | $450 | $3,000 | $138 | Standard |

- Example 2 – **Two standard events on same day**: T-Mobile concert and Azura event

  We combine the venue contribution plus donations from <u>both</u> venues. It is split evenly between all volunteers working that day regardless of amount of time worked.

| TWO STANDARD EVENTS | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Volunteer** | **Venue** | **Venue Contribution** | **Total workers/venue** | **Total donations/venue** | **Total Venue Contribution** | **Posted Amount** | **Event Type** |
| George | TMC - Concert | $120 | 25 | $450 | $3,000 | $138 | Standard |
| Mike | Azura | $70 | 25 | $700 | $1,750 | $118 | Standard |
| | | | 50 | $1,150 | $4,750 | | |

- Example 3 – **One extended event**: Chiefs

  Volunteer gets what the venue contributes plus donations. It is split evenly between all volunteers working that day regardless of amount of time worked.

| ONE EXTENDED EVENT | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Volunteer** | **Venue** | **Venue Contribution** | **Total workers/venue** | **Total donations/venue** | **Total Venue Contribution** | **Posted Amount** | **Event Type** |
| Charlie | Arrowhead - Levy - Chiefs | $120 | 25 | $600 | $3,000 | $144 | Extended |

- Example 4 - **Two Extended** (longer day) events and **two Standard** (typical day) event on same day: Chiefs game, T-Mobile concert and Azura

  The contribution and donation funds from the two extended events are combined together & split equally among only the volunteers that worked the events.
  The contribution and donation funds from the two standard events are combined together & split equally among only the volunteers that worked the events.

| TWO EXTENDED EVENTS PLUS STANDARD EVENT - **SEPARATE** POOLS | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Volunteer** | **Venue** | **Venue Contribution** | **Total workers/venue** | **Total donations/venue** | **Total Venue Contribution** | **Posted Amount** | **Event Type** |
| Charlie | Arrowhead - Levy - Chiefs | $120 | 25 | $600 | $3,000 | $157 | Extended |
| Sally | Arrowhead - Aramark - Chiefs | $150 | 100 | $1,000 | $15,000 | $157 | Extended |
| | | | 125 | $13 | $18,000 | | |
| George | TMC - Concert | $120 | 25 | $450 | $3,000 | $120 | Standard |
| Betty | Performing Arts Center | $70 | 12 | $144 | $840 | $120 | Standard |
| | | | 37 | $16 | | | |

**** All examples are fictitious and represent pre-fees/deductions being removed****