



SERVICE PERSONNEL HANDBOOK

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Version 10/23/18

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INTRODUCTION

This handbook contains a general description of the policies and procedures applicable to all volunteers or other persons providing services to Victories of the Heart, NFP, including without limitation directors, officers, consultants, and weekend leaders, assistant leaders, and staff men (“Service Personnel”). It is not intended to anticipate every situation regarding the relationship between Service Personnel and Victories of the Heart. Suggestions regarding improvements in these policies should be brought to the attention of the President or Executive Director. The Board of Directors reserves the right to change or eliminate any of these policies at any time and without advance notice.

AT WILL RELATIONSHIP

The relationship between Victories of the Heart and all Service Personnel is at will. This means that the relationship is voluntarily entered into and can be terminated by either party at any time, for any or no reason, with or without cause. The policies set forth in this Handbook are not intended to create a contract of any kind and may be changed or cancelled at any time at the sole discretion of the Board of Directors of Victories of the Heart.

OUR MISSION

We are a nonprofit organization dedicated to helping men of all backgrounds build stronger relationships, greater self-acceptance, and more satisfying lives. We offer weekend and group experiences that assist men in making positive life transitions by educating them in matters concerning emotional self-awareness and healthy communications with others. Our programs are built on a solid foundation of accepted clinical theory and practice. We are committed to the principles of responsibility, integrity, safety, and support. Our goal is to provide men with an authentic and enriching personal experience as a catalyst for significant emotional growth.

OUR PHILOSOPHY

We believe that men’s physical and mental health is significantly enhanced when they choose to participate in deep, honest, and meaningful relationships. Our programs create the arena for self awareness and offer men the opportunity to identify the changes they wish to make in their lives and the blocks that hold them back. We provide a safe and caring environment where men can take the risk to be vulnerable and express their deepest emotions. We do not offer professional therapy services even though our processes are based on sound psychological principles.

The role of our program leadership teams is to enhance individual autonomy by deepening a man’s experience so that he can *make his own choice* as to what he needs to do to

improve his life. Our personal opinions as to that choice are largely incidental. We are facilitators whose function is to model, teach, and empower.

Professionalism, responsibility, accountability, and devotion to the best interests of the men who attend our programs are expected of all Service Personnel. We expect our Service Personnel to read and abide by the principles set forth herein and to familiarize themselves with the entire Victories web site, particularly the “Frequently Asked Questions and Answers” section.

AUTHORITY OVER PROGRAMS AND PERSONNEL MATTERS

The Board of Directors is responsible for overseeing and approving the organization’s programs and personnel policies. The Board has created a Program Committee to review and make recommendations concerning (1) the content of all Victories training programs, (2) personal growth groups, (3) additions or deletions of programs, (4) weekend leaders, assistant leaders, and staff personnel, and (5) ethics. Programs are to be evaluated consistent with the tests of (i) clinical validity, professional ethics, and research-validated practice and (ii) withstanding public scrutiny. The standards for appointing and reviewing leaders and assistant leaders are more fully described in Section XI below. The Board will review its personnel policies periodically and as needed. The President and Executive Director are responsible for the implementation of personnel policies in conjunction with the Program Committee. Final decisions concerning programs, personnel, and ethics rest with the Board of Directors.

WELCOMING ENVIRONMENT – NO DISCRIMINATION OR HARASSMENT

The programs and service opportunities offered by Victories of the Heart are open to all qualified men. No one shall be excluded on the basis of race, ethnicity, sexual orientation, age, religion, political affiliation, ancestry, or other characteristic protected by federal, state, or local law. Physical or verbal harassment will not be tolerated. Anyone who believes that he or she may have experienced or witnessed discrimination or harassment must immediately report the incident to the President or Executive Director.

We believe that our Service Personnel should be able to work in an atmosphere free from all form of harassment. Harassment is physical or verbal conduct relating to an individual’s race, ethnicity, sexual orientation, age religion, political affiliation, ancestry or other protected status when this conduct: (a) has the purpose or effect of creating an intimidating, hostile, or offensive working environment, (b) has the purpose or effect of unreasonably interfering with an individual’s performance, or (c) otherwise effects an individual’s service opportunities. Harassment, whether by fellow Service Personnel, program participant, or guest will never be tolerated.

If you believe that you are the victim of harassment, you are requested to document the time, place, and circumstances of the incident and promptly report it to the President or Executive Director. Weekend leaders are required to report any such incidents, which they

observe or of which they are informed, immediately to the President or the Executive Director. Retaliation against any person who has complained of harassment or participated in an investigation of harassment will not be tolerated.

HEALTH AND SAFETY

Physical Safety. All Service Personnel are responsible for maintaining an environment that is physically safe. This means that (1) no one shall staff a weekend without attending Basic Staff Training or some equivalent training in ensuring the physical safety of weekend attendees, (2) all leadership teams are to familiarize themselves and the participants with the emergency and medical services available at any location where Victories trainings are conducted, (3) weekend leaders and/or key staff are required to determine whether anyone attending a weekend suffers from a medical condition, which might limit that person's ability to participate in any of the weekend processes, and (4) weekend leaders are to ensure that at least one member of the weekend leadership team has CPR certification and that a defibrillator is available throughout the training. All Victories activities shall be conducted in a smoke and intoxicant free environment.

Emotional Safety and Confidentiality. Service Personnel are expected to maintain the confidentiality of the experiences and statements of all persons attending any Victories training or program and will not reveal such information to any other person, except as required by law or the code of professional ethics applicable to that individual. In the event that a Service Person receives information concerning a clear and imminent threat of harm to self or another (including, but not limited to, domestic abuse or the physical or sexual abuse of a child or elder), the Service Person shall report such information as required by law or the applicable code of professional ethics. Service Personnel who are not otherwise subject to a duty to report shall, nevertheless, immediately report such information to a senior Victories leader who is under such a duty and promptly thereafter to the President of the corporation. Weekend participants and staff shall receive written notice of this Policy in their registration or training materials.

Weekend participants are to be informed that they are free not to participate in any of the weekend processes and that they will not be judged, pressured, or shamed if they choose not to do so.

Reporting Critical Incidents. Service Personnel are expected to report promptly to the President or Executive any actual or potential incident involving physical or emotional injury.

SELF-DISCLOSURE BY LEADERS AND STAFF DURING WEEKEND PROGRAMS AND PERSONAL GROWTH GROUP FACILITATION

Leaders and staff members often participate in processes and personal sharing on weekends and in PGGs, for several reasons, including modeling for participants and deepening connection within the container. Leaders and staff need to be mindful of the impact on participants of how they disclose and what they disclose in these situations, and remember that their job on the weekend is not to focus on their own personal growth but rather to help the participants do theirs. While leader and staff self-disclosures need to be authentic and from the

heart, care also needs to be taken not to disclose information that might disturb or traumatize participants, weaken trust, or otherwise undermine the participants' sense of safety and security within the container and the helping relationship. Mental health professionals should also consider relevant provisions in their respective codes of ethics. One useful rule of thumb: When in doubt, don't disclose.

Of course, these limitations on self-disclosure are not applicable to the work of the leadership team (leaders and staff) in preparing the emotional container for the weekend by doing their own heartwork before the participants arrive and processing the experience after the participants leave.

COMPENSATION & REIMBURSEMENT OF EXPENSES

Except for written contracts approved by the Board of Directors and compensation for weekend leaders, all services rendered to Victories of the Heart are donated through the generosity of Service Personnel.

Each of the two senior leaders responsible for a Victories weekend program is entitled to an honorarium of \$500 and reimbursement of up to \$250 in weekend expenses, subject to documentation of said expenses and approval by the President or Executive Director. Senior leaders are encouraged to decline the honoraria unless the time taken to lead a weekend imposes an undue hardship due to the loss of normal income.

CONFLICTS OF INTEREST

A conflict of interest arises when a Service Person's relationship with an outside organization or individual can be interpreted as detrimental to Victories of the Heart or as an unfair use of the Service Person's relationship with Victories of the Heart. Service Personnel must avoid actual conflicts of interest and the appearance of such conflicts. If there is any doubt as to whether a specific situation may be construed as a conflict of interest, Service Personnel should immediately discuss the situation with the President or Executive Director. The Executive Director and President should discuss their own actual or potential conflicts with the Executive Committee.

Service Personnel may not accept anything of value from persons or entities seeking to do business with Victories of the Heart. This applies to gifts in any form, including entertainment, merchandise, payments, loans, and services from anyone doing business with or soliciting business from Victories of the Heart. It does not bar courtesies of nominal value or customary and proper social relations consistent with good business ethics and which do not involve or imply an obligation.

Service Personnel may not engage in any transaction with Victories of the Heart, which might benefit them personally without disclosing and obtaining approval of the proposed transaction by the Board of Directors. Service Personnel having an interest in any such transaction shall not vote or participate in Board deliberations concerning the proposal. The

minutes of the Board of Directors shall record the name of the Service Person involved in the proposed transaction, a description of all material terms, the action taken by the Board, and the names of the directors voting for and against the transaction.

CODE OF ETHICS

Service Personnel agree to behave in a professional and ethical manner at all times and to convey a personal image of high standards and expectations. Service Personnel who are members of healing and therapeutic professions agree to abide by the rules of professional conduct and codes of ethics applicable to said professions.

Service Personnel acknowledge that, as a result of their positions with Victories of the Heart, they may enjoy a unique or special relationship with the men participating in Victories' programs and agree to avoid any form of relationship that could reasonably be considered to be exploitive or otherwise create a conflict of interest. Specifically, for a period of two years following the completion of a man's participation in a Victories' weekend or other program, no Service Person who attends or leads that weekend or program shall become engaged in any new financial, business, or therapeutic relationship with that individual. In the case of a new sexual relationship, this prohibition shall be in effect for five years.

Service Personnel who are mental health professionals shall avoid dual relationships involving their clients and Victories of the Heart unless they can be assured that (1) the relationship does not violate the code of conduct applicable to their profession and (2) the relationship will not adversely affect their client. In particular, this means that no mental health professional will invite a client to a weekend, which he is attending as staff or participant, without full disclosure to the client of the potential change in the therapeutic relationship that may occur as a result of attending the weekend together. If more than one such client accepts the invitation, the professional must (1) disclose to each client the fact that other clients from his therapy practice will be in attendance and (2) fully discuss the therapeutic and confidentiality implications of the situation.

Men who are present mental health clients of Service Personnel shall not staff a Victories program with their own mental health professional.

Men who were formerly mental health clients of Service Personnel shall not staff a Victories program with their former mental health professional for a period of three years following the termination of the professional relationship.

Men who are present mental health clients of Service Personnel shall not be promoted to the position of weekend leader or assistant weekend leader.

Service Personnel shall not discuss confidential information with anyone (including the participant's mental health professional) in the absence of the participant's written consent. Only those Service Personnel who hold valid mental health licenses are permitted to participate in such conversations with a participant's mental health professional.

Service Personnel are responsible for ensuring adherence to the physical and emotional safety standards outlined in this Handbook.

Service Personnel shall exhibit responsible concern for the well being of their peers and the men attending Victories programs by not ignoring inappropriate or unethical conduct in colleagues. All such conduct shall be reported to the President or Executive Director.

Service Personnel shall seek clarification and/or guidance from the President or Executive Director if they are unclear about any of the concepts in or application of the Code of Ethics.

LEADERSHIP

Our weekend leaders are men who are chosen based on their own personal growth and development; their general experience, training, and ability; their knowledge of and past participation in our programs and processes; their adherence to our underlying philosophy and clinical rationale; their dedication to high ethical principles; their willingness and ability to lead; and their ability to work collaboratively in a group environment.

Weekend leaders and Assistant Leaders are appointed by the Board of Directors for a two year term and subsequently evaluated every two years by the Board in conjunction with the Program Committee.

CONFIDENTIAL AND PROTECTED INFORMATION

The contents and processes of our weekend programs are generally described in the “Frequently Asked Questions” section of the Victories web site. In addition, the site is also being updated to provide a description of the clinical rationale for our weekend processes. Hence, there are no “secrets” about the weekends except for the individual statements and experiences of the participants.

The structure and components of our weekends, groups, trainings, and workshops are the intellectual property of Victories of the Heart, NFP and, therefore, Service Personnel are obliged not to divulge, copy, or use this property for any purpose other than the performance of service for Victories of the Heart.

RESPONSIBILITIES OF DIRECTORS

The Board of Directors is responsible to lead, govern, fund and participate in the activities of Victories of the Heart, NFP. Their role is more specifically described as follows:

Lead. Board members recognize that, pursuant to governing statutes and corporate bylaws, the property, business, and affairs of Victories of the Heart are managed by its Board of

Directors. Directors are more than weekend leaders. They are the *organization's* leaders. Their role is to (1) develop and articulate the organization's vision and values; (2) generate and mobilize its resources; (3) establish, understand and adhere to its programs, philosophy, and principles; and (4) guide organizational strategy and management.

Govern. Board members provide governance by: (1) establishing and reviewing Board policies and goals; (2) evaluating the Executive Director; (3) nominating and evaluating Board members; and (4) exercising fiduciary responsibility through prudent, legal, ethical, and financial oversight.

Fund. Board members understand that funding – through personal contributions and the solicitation of others – is one of their primary responsibilities. Board members participate actively and aggressively in fundraising activities, events, and solicitations. They identify, cultivate, and solicit potential donors. They take personal responsibility for a minimum “give or get” goal of at least \$1,000.00 per year per Board member net of any compensation they might derive as weekend leaders.

Participate. Board members actively participate in the organization's business and programs. They (1) attend at least two Board meetings per year, (2) serve on at least one Board committee, (3) represent the organization in its relations with centers of influence, and (4) participate in at least one of the organization's training programs per year.

PAPERWORK AND FINANCIAL REQUIREMENTS FOR LEADERS AND STAFF

All weekend leaders and staff are asked to complete the following items and return them to the Victories Office by the first weekend staff meeting:

- Acknowledgement & Receipt page (see page 12)
- Updated Medical Form (see page 13)
- Sustaining Membership (see pages 10-11 for explanation of policy; see page 14 for form)
- Staffing Food & Lodging Fee

All forms should be mailed, faxed, or scanned/mailed to the Victories Office by the first weekend staff meeting.

**WEEKEND PROGRAM
WAIVER OF LIABILITY AND GENERAL RELEASE**

In consideration of my participation in the above named workshop, I hereby release, waive, and discharge Victories of the Heart, NFP and its officers, directors, workshop leaders and staff, employees, volunteers, representatives and agents of and from any present or future claims or causes of action, whether or not presently known or unknown, which may arise from or in any way relate to my participation in said workshop, including without limitation property damage and personal injury (including death) associated with (i) travel to and from the workshop, (ii) participation in workshop and post-workshop activities, and (iii) the inherent risks of visiting a remote location where medical care and evacuation may be delayed.

I understand and acknowledge that this workshop is intended to promote deep personal growth and involves physical and emotional activities that may be vigorous and challenging to me and other attendees. I am willing to, and hereby do, assume the physical and psychological risks inherent in such activities. *I understand and acknowledge that my participation in any workshop process or activity is strictly voluntary and I may decline to participate in any process or activity at any time.* I am fully capable of participating in a program of this nature without causing harm to myself or others. I have no physical or psychological condition which could affect my safety while participating in this program, except as disclosed specifically in writing by me to Victories of the Heart, NFP prior to the commencement of the program. I have adequate health and/or other insurance to cover any injury or damage I may cause or sustain while participating in this program and any travel associated therewith. I understand and acknowledge that Victories of the Heart, NFP and others identified above will rely upon my statements in this Waiver of Liability and General Release in allowing me to participate in the above named workshop. This Waiver of Liability and General Release shall be binding upon myself and my heirs, successors, and assigns.

Weekend Staff Sustaining Membership and Food & Lodging Fee Policy

Victories truly appreciates the 80-100 hours that each individual gives when staffing a Victories weekend. Each staffer also receives significant personal growth benefit from staffing the weekend. There are, however, food and lodging costs for having leadership teams of ten men, on average.

Only sustaining members (those who donate \$250+ per year) will be eligible to staff Victories weekends. Installment options are available (i.e., \$25/month for 10 months).

In addition to the annual Sustaining Membership amount, weekend leaders and staff are asked to also pay a per weekend Food and Lodging Fee of \$100. The staffing fee will partially offset the cost of food and lodging for the leadership team. Payment of Sustaining Membership and Weekend Food & Lodging Fee must be made prior to the first staff meeting, unless on a payment plan.

As is always the case with Victories programs, this staffing policy will NOT exclude men who, due to financial constraints, are not able to become sustaining members.

Your tax deductible yearly membership donation of \$250 will entitle you to a variety of benefits including:

- \$100 off our weekends (BreakThrough, Wisdom Years, Shadow, Best Self, Couples)
- 20% off all Paths to Leadership training programs

Even with all the tangible benefits of membership, the most satisfying will be one that is intangible: the knowledge that you are helping us help others to experience the transformative programs that so often help men realize their dreams, become better partners and parents, and achieve greater peace of mind.

To become a Sustaining Member, register online or contact Victories at 312.604.5013 or admin@victoriesformen.org.

More information here: www.victoriesformen.org/Support_Victories/Sustaining_Members

Here is the rationale behind the Sustaining Membership Policy, which was adopted by the Board:

- There is real cost to having a large staff on a weekend, which includes an extra day (Thurs night/Friday day). Besides building the container for the men, this extra day is intended as a time dedicated to staff to do their own work and receive support from experienced leaders.
- Staff have historically reported that they get so much more out of the staffing experience than they give. They report their experiences staffing are as important to their own growth, if not more, than their experience as participants. Given these comments, staffing is seen as one of many offerings Victories provides over a

lifetime for continued personal growth; it is, in fact, a program offering itself – an opportunity and a privilege, not a right. If it has value, it's reasonable to assess a minimal financial value to the experience.

- The strategic plan of the Board called for moving from an all volunteer model to a paid staff plus volunteer model. This meant that a culture of giving would need to be instilled in the alumni community. Creation of a membership model and culture, common in non-profits, was seen as a natural next step towards more sustainable funding of Victories. It was natural that this membership model be first applied to those who are most engaged and most benefit: those that staff weekends. The Board thought it reasonable to assess a membership fee, which, in essence, can be broken down to monthly “dues” of about \$20/month. \$20/month towards a cause and an organization that one deeply believes in was thought to be quite reasonable.
- When leaders decide on staff, they were not to choose just from a list of those who were already members, but to anyone who had done the appropriate training. If they were not members, they were to be told of the policy. Like with all Victories programs, if, for financial reasons they were not able to comply, they should communicate that to the Victories office; a membership fee reduction or waiver would be given on a case by case basis.
- The Board and its fundraising arms had been regularly frustrated about the disconnect between giving of time and giving financially, and they wanted to counter the sentiment and culture widely seen in Victories, that “I give my time, so I don't have to give \$\$\$.” We hear and see praise from alumni about the transformative nature of our programs and how much Victories has meant to them and their lives. If this is the case, why is there not charitable giving consummate with that experience of Victories? The creation of this policy was an attempt to begin to reverse this disconnect, by creating more of a culture of giving, something that all non-profits need to instill to ensure long term viability. While there has been some pushback from those that were around before this policy was established, we have found that most folk new to Victories staffing accept the policy and its rationale without question. Even those that resisted initially, came around to support the policy once they heard more about the reasoning behind it.
- Programs similar to ours, ie Warriors and Women Within, have similar staffing policies.

If staff have further questions about this policy, they can contact the Victories Office at admin@victoriesformen.org.

ACKNOWLEDGEMENT AND RECEIPT

I, _____, acknowledge receiving this Handbook and the Waiver of Liability and General Release, and I agree to familiarize myself with its contents and abide by the policies of the Board of Directors.

Signature

Date

Address: _____

Phone: _____ Email: _____

If you have not yet completed the Alumni Survey, please take a minute and answer these few questions

Wisdom Years Participation (mark all that apply):

- I have already attended the Wisdom Years
- I have not attended Wisdom Years but would consider attending sometime in the future
- I have staffed a Wisdom Years Weekend
- Indicate month(s) and year(s) of your initial weekends and weekend(s) staffed (best estimate):

BreakThrough Weekend Participation (mark all that apply):

- I have already attended the BreakThrough Weekend
- I have not attended BreakThrough Weekend but would consider attending sometime in the future
- I have staffed a BreakThrough Weekend
- Indicate month(s) and year(s) of your initial weekends and weekend(s) staffed (best estimate):

Shadow Weekend Participation (mark all that apply):

- I have already attended the Shadow Weekend
- I have not attended the Shadow Weekend but would consider attending sometime in the future
- I have staffed a Shadow Weekend
- Indicate month(s) and year(s) of your initial weekends and weekend(s) staffed (best estimate):

Personal Growth Groups (PGG's) Participation (the ongoing follow-up groups organized after the Wisdom Years and BreakThrough weekends)

- I never was in a Personal Growth Group
- I used to be in a Personal Growth Group but no longer attend
- I am interested in becoming a member of a Personal Growth Group
- I'm currently in a Personal Growth Group.
 - We meet here (location and day of week): _____
 - Frequency of meetings: _____
 - Names of men in group: _____



MEDICATION/ALLERGY/PHYSICAL STATUS INFORMATION FORM

This form needs to be completed once a year, or more often if there are changes, by all Weekend Leaders and Staff. It will be kept on file and can be used on other trainings and weekends. Please complete this form and return it via mail, fax, or scan/email. If you have a health concern you would like us to know about prior to the weekend, please call 312.604.5013. This form will be kept confidential to the extent permitted by law.

NAME (please print): _____ BIRTH DATE: _____

Please list below ALL PRESCRIPTION DRUGS you are currently taking or plan to have with you for the weekend. List name, dosage, frequency, and reason/diagnosis for taking each drug.

DRUG NAME	DOSAGE	FREQUENCY	REASON(DIAGNOSIS)
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Please list below substances/foods to which you have an ALLERGY and any DIETARY NEEDS.

Please list below any current or chronic PHYSICAL AILMENTS or LIMITATIONS or MENTAL HEALTH CONDITIONS

In case of emergency, please notify:

Name (please print)	phone number
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Primary Care Physician (please print)	phone number
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Have you been hospitalized in the last two years? If so, please explain why.



SUSTAINING MEMBERSHIP

By the first staff meeting, weekend leaders and staff are asked to fulfill their sustaining membership and staff food & lodging fee requirement. Staff may pay this online, by calling the office, or completing this form.

I wish to become a Sustaining Member & pay the Food & Lodging Fee as a staff member for the

Circle One: BreakThrough Wisdom Years Shadow _____ weekend.
(Weekend Dates)

_____ A check for \$350 is enclosed, payable to **Victories of the Heart, NFP**

_____ Please charge \$350 to my credit/debit card listed below.

_____ I will pay online: (If you donate \$350 online, the \$250 Sustaining Membership is a donation, but the \$100 staffing fee is not.)

_____ I would like to pay the \$350 in 10 monthly payments of \$35/month. Please fill out the credit/debit card information below for an automatic monthly payment plan.

_____ I am not in a financial position to pay the full \$350, but I can contribute \$ _____. Please fill out the credit/debit card information below, or include a check. The Victories Office may ask to have a brief conversation about your financial situation.

_____ I am already a Sustaining Member. I would like to pay my \$100 for the Staff Food & Lodging Fee. Please charge my credit/debit card listed below, or I have enclosed a check.

Card #: _____ Exp. Date (mm/yy): ____ / ____

Name (as it appears on the card): _____ CVV: _____

Billing Address: _____

Signature: _____ Date: _____