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2020

# Ignatian Spirituality Project Volunteer Handbook



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## Welcome Message

Dear New ISP Volunteer,

On behalf of all of us at the *Ignatian Spirituality Project*, welcome and thank you for joining our ministry! You are now a member of an exciting and growing movement of nearly 800 ISP volunteers serving across the U.S. and Canada.

ISP's most valuable resource is our volunteer corps who are committed to working with men and women transitioning out of homelessness and breaking the cycle of addiction. Simply put, volunteers make our ministry possible: ISP could not exist without the dedication and commitment of people like you. Together, we can make an incredible difference.

There are a variety of volunteer opportunities available through ISP. Volunteer positions such as team coordinator, retreat facilitator, ongoing accompaniment leader, mentor, and hospitality and stewardship roles are available with flexible schedules that fit busy lifestyles. We hope that you find volunteering with ISP a positive and rewarding experience.

This Handbook was created to provide you with information to help guide and enhance your volunteer experience. Please take the time to read through it and refer back to it as questions arise. As always, feel free to contact your local team Coordinator or ISP Network staff for additional information.

Once again, welcome to the *Ignatian Spirituality Project*.

*Lord, teach me to be generous.  
Teach me to serve you as you deserve;  
to give and not to count the cost,  
to fight and not to heed the wounds,  
to toil and not to seek for rest,  
to labor and not to ask for reward,  
save that of knowing that I do your will.*  
~St. Ignatius Loyola

Sincerely,

Thomas D. Drexler  
Executive Director  
Ignatian Spirituality Project

## Handbook Description

This Handbook was prepared to give you some essential information about the policies and expectations of ISP, and thus serve as a guide to a successful volunteer experience. The handbook has been organized by topic to help you find information you need.

ISP Volunteers agree to promote the values of our program and to encourage one another to grow in their faith. Much of what is expected is a matter of common sense and sound judgment. While it is not anticipated, it is important to note that negligence or disregard of the policies and guidelines contained in this Handbook may result in dismissal from the volunteer team and prohibit future volunteer opportunities with ISP.

You are also encouraged to talk with your local team Coordinator or ISP Network staff if you have any questions about the content of this Handbook.

ISP reserves the right to modify the policies in this Handbook without prior notice. The policies herein replace all prior policies, handbooks or policy guidance provided. Please note that the terms “Team Member” and “Volunteer” are interchangeably throughout this handbook.

Thank you for giving your time and talents to the ISP ministry. We are grateful!

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## Mission and Approach of ISP

### *Our Mission*

The mission of the Ignatian Spirituality Project is to offer life-changing spiritual retreats to men and women experiencing homelessness and in recovery from addiction. Based in the Spiritual Exercises of St. Ignatius and the 12 Step recovery program, ISP retreats help to lay a foundation of hope and healing to support long-term personal transformation.

### *Brief History*

The ISP story begins in 1998 when Bill Creed, SJ was invited by his Jesuit Provincial to make the *Spiritual Exercises* available to the materially poor. With his good friend Ed Shurna, Bill developed a retreat format that drew upon the 500 year-old tradition of Ignatian spirituality expressed in the contemporary language of 12 Step recovery.

In 2005, Bill was invited to apply for a founding grant that allowed the emerging organization to become a nationwide Network. Subsequently, ISP incorporated as a 501(c)3 and in 2008 hired its first full-time staff. Today, the ISP program includes overnight retreats, follow-up days of reflection, and ongoing accompaniment programs that care for the interior and spiritual lives of those transitioning out of homelessness and addiction. Over the years, the ISP Network has grown tremendously, with hundreds of ISP programs now being offered annually in 30 cities across North America.

### *Goals and Philosophy*

At the core of the Ignatian Spirituality Project mission is a commitment to nurturing spirituality as an important source of recovery from the cycle of homelessness and addiction. While there are many organizations that provide necessary material resources (housing, employment, drug treatment, etc.), the ISP program was founded on the belief that real transition from chronic addiction and homelessness is predicated on an individual having the inner resources to make more positive life choices. We believe that chief among these inner resources is the opportunity to develop an authentic, lived spirituality.

The great majority of our program participants have had their lives sabotaged by addiction. A spirituality that focuses on awareness of, and freedom from, compulsions and obsessions can help all of us draw closer to, and develop a life-giving relationship with, God or our Higher Power. ISP programs are founded in the Ignatian (Jesuit) spiritual tradition. Ignatian spirituality, while sharing much in common with other Christian spiritualities, is noteworthy for two primary characteristics: 1) it is *incarnational* rather than transcendent (God is present among us, not distant from humankind) and 2) it focuses on *reflection upon our concrete, lived experiences* (we grow in our faith by reflecting on God's presence in our everyday lives).

ISP's primary program, the overnight retreat, is designed as an introductory experience. Over 90 percent of participants have never before made a spiritual retreat. It therefore has a gentle rhythm that invites and challenges the retreat participant to bring his or her self to a God who is receptive and encouraging. This is a profoundly new experience for many. It is traditionally small, involving just a handful of facilitators and about a dozen participants to help encourage honest and reflective sharing. The format has been designed to allow participants to claim, or reclaim, God's presence in their lives and thus experience the hope and strength that allows them to continue in their journey of transformation.

### ***Our Four-Fold Approach***

1. Offering retreats and spiritual companionship inspired by Ignatian Spirituality to those who are homeless and seeking recovery.
2. Building a network of volunteer teams to respond to the spiritual needs of those who are homeless.
3. Including on our teams men and women who have themselves experienced homelessness.
4. Collaborating with individuals and agencies working to end the injustice of homelessness.

### ***Connection to the Society of Jesus (Jesuits)***

ISP maintains a strong, intentional, and grateful connection to the Society of Jesus. ISP volunteers, the great majority of whom are lay women and men, work in collaboration with Jesuits across the country. The 34<sup>th</sup> General Congregation of the Society of Jesus affirmed:

*Jesuits are both 'men for others' and men with others. This essential characteristic of our way of proceeding calls for an attitude and readiness to cooperate, to listen and to learn from others...The Society of Jesus acknowledges as a grace of our day and a hope for the future that laity 'take an active, conscientious, and responsible part in the mission of the Church in this great moment of history.' We seek to respond to this grace by offering ourselves in the service to the full realization of this mission of the laity, and commit ourselves to that end by cooperation with them in their mission.*

ISP is recognized as an apostolic work of the Midwest Jesuit Province, which means that the Province plays a critical role in sponsoring our ministry and offering key institutional oversight. While the Society of Jesus maintains general oversight of the ISP ministry, we are a separately incorporated 501c(3), federally recognized, charitable program.

## Organizational Structure

The ISP Network office in Chicago provides substantial volunteer training and formation programs and financial and administrative infrastructure to support 29 ISP affiliates across North America.

### *Network Staff Descriptions*

Executive Director: Tom Drexler  
Directs the work and vision of ISP

#### PROGRAM STAFF

Director of Programs: Christine Curran  
Oversees programs to ensure mission integrity & effectiveness

Regional Coordinators: Steve Donaldson  
Primary program contact and resource for ISP affiliates

Matthew Meyers  
Primary program contact and resource for ISP affiliates

Jan O'Halloran  
Primary program contact and resource for ISP affiliates *(1/2 time)*

Team Formation: Amanda Asque  
Program Assistant for Team Formation *(serves on as-needed basis)*

#### DEVELOPMENT STAFF

Director of Development: Catherine Ruffing Drotleff  
Oversees development and fundraising initiatives on the Network and local levels to ensure financial sustainability

Development Associate: Jan O'Halloran  
Assists development on the Network and local levels *(1/2 time)*

Business Manager: Sharon Alexander  
Oversees accounting and business operations



## *ISP Engagement Model*

There are two primary ways ISP partners to offer our ministry:

- **City Affiliate (CA):** A team of committed volunteers which collaborates with local homeless service providers and retreat centers to offer ISP retreat programs in their city. With the help of the Network development office, volunteer teams are responsible for fundraising to support and sustain their local ISP programs. City Affiliates operate under ISP's 501c(3) designation. Volunteers in City Affiliates are covered under ISP's insurance liability plan while volunteering on behalf of ISP programs.
- **Institutional Affiliate (IA):** This partnership model was introduced in 2017 which allows for an independent 501c(3) organization to offer ISP retreat programs as part of their ministry. Institutional Affiliates are responsible for covering the direct costs of their ISP programs and for providing their own fundraising and financial support. Institutional Affiliates also pay the ISP Network an annual fee to cover training, formation, and license costs and agree to provide insurance and liability coverage for volunteers engaged in their sponsored ISP programs.

While their organizational and financial models are different, City and Institutional Affiliates are identical programmatically in terms of types of ISP programs offered. Furthermore, the ISP Network office provides both Affiliate models the same high level of formation and program support, and the volunteer training and formation expectations remain the same.

### *ISP Affiliates (year founded):*

Akron (2010)	Milwaukee (2008)
Bay Area (2006)	New Orleans (2009)
Boston (2006)	Oklahoma City (2018)
Chicago (1998)	Omaha (2009)
Cincinnati (2006)	Our Lady of Mt. Carmel Church, Ridgewood, NJ (2017)*
Cleveland (2006)	Orange County (2014)
Dayton (2010)	Portland (2014)
Detroit (2013)	Providence (2015)
Denver (2008)	Toronto, ON (2017)*
Houston (2009)	St. Louis (2007)
Ignatius House Retreat Center, Atlanta GA (2006)*	San Diego (2015)
Louisville (2014)	Seattle (2012)
Loyola Jesuit Center, Morristown NJ (2010)*	St. Ignatius Church, Baltimore, MD (2007)
Manresa House of Jesuit Spirituality, Dublin (2019)*	Twin Cities—Minneapolis/St. Paul (2011)
	Washington, D.C. (2009)

\* Institutional Affiliate programs

## Programs Description

### *Who We Serve*

Ignatian Spirituality Project programs are designed for men and women who have experienced homelessness and are in recovery from substance abuse. Though we recognize that our ministry model, based in Ignatian spirituality and 12 Step principles, might be effective with a variety of populations on the margins, ISP has chosen to focus our work specifically at the intersection of *homelessness and addiction*.

#### *'Homelessness'*

ISP serves men and women who are in the process of transitioning from homelessness and are currently living in sheltered housing. This includes those residing in substance recovery homes, transitional housing programs, 30/60/90-day treatment facilities, short and long-term affordable housing, group-based and independent supportive housing, "halfway houses," prison reentry programs, and emergency shelters. Because of the need for a minimum level of housing stability and a safe place to return upon completion of the retreat, *ISP does not work with individuals who are unsheltered, i.e. "living on the street."* ISP teams rely on relationships with case managers/social workers at partner agencies to refer appropriate candidates for our programs. Staff members who know the ISP program as well as the prospective candidate are in a good position to discern an individual's maturity and readiness for an overnight retreat. For this reason, nurturing strong relationships with staff at local partner agencies is crucial to building an effective ISP ministry.

#### *'Recovery'*

To be eligible to attend an ISP overnight retreat, prospective participants should be in recovery from alcohol or drug use AND in most instances at least 3 months sober, i.e. abstinent from alcohol and illegal substances. Though ISP recognizes that recovery and addiction take many forms, the ISP program is specifically designed for individuals with *alcohol and/or substance use addiction*, and is not appropriate for those struggling with other compulsions or addictions.

ISP, while based in the 12 Step approach, recognizes that "recovery" may take a variety of forms. Though a 12 Step background is certainly helpful, individuals need not be actively working a 12 Step (AA/NA) program to engage in ISP programs. That said, prospective candidates should be informed of our 12 Step approach and open to engaging these principles while participating in ISP programs.

For the sake of creating a culture of safety and spirituality on our retreats as well as for liability reasons, individuals who are still actively using alcohol or drugs may not attend an

overnight retreat. These individuals are welcome to participate in on-site ISP ongoing accompaniment programs, if offered.

Individuals who are taking medication assisted treatment (“MAT”), i.e. methodone, suboxone, etc. prescribed as part of their recovery program, may attend an overnight retreat if they are recommended by their case manager and meet certain guidelines. (For more detailed information on this and other best practices, see ‘**Alcohol & Substance Use Policy**’ under Organizational Policies.)

Any questions about *Who We Serve* should be addressed to your local Team Coordinator, or ISP Regional Coordinator liaison for your ISP affiliate.

## *ISP Programs*

### ISP Retreat

#### **Our primary and foundational program, intended as an introductory experience**

- **Overnight Retreat:**

This is our standard ISP retreat format. The overnight retreat typically begins mid-morning on Day 1 and ends with lunch on Day 2. A full description of this retreat can be found in *“Format for an ISP Overnight Retreat.”*

- **2 Night Retreat:**

Adapted version of our overnight retreat. Includes all movements of the overnight retreat plus extra reflection exercises and activities. Retreat typically begins in mid-morning of Day 1 and ends with lunch on Day 3. Only a small minority of affiliates currently offer this retreat. The Network office can share 2 Night Retreat best practices upon request.

- **1 Day Retreat:**

Adapted version of the overnight retreat. Includes most of the movements of the overnight retreat, adapted to fit an 8-10 hour time frame. Can work well in situations where participants aren’t able to stay out overnight, or for new affiliates or affiliates on a limited budget. Description of this retreat can be found in *“Format for an ISP One-Day Retreat.”*

**Day of Reflection (“Follow Up”):** Follow up experience that regathers overnight retreat participants, typically 3-4 weeks following retreat. Allows participants to reflect on what has happened since the retreat and how God has been present to them. Description of Follow Up and best practices can be found in *“ISP Follow Up Format.”*

**Ongoing Accompaniment (OA):** Ongoing program engagement with retreat alumni following overnight retreat experience. OA can take the form of regular faith sharing group, Ignatian prayer, bible study, etc. While the Network office can provide ideas and best practices, there is no standardized OA format at this time.

## Team Structure

### *History*

From our beginnings, our founders and early collaborators agreed that the ISP Network should be flexible. Rather than following the “franchise” model of some corporations (e.g., McDonalds), which tends to have rigorous and specific guidelines for operations, the ISP Network was envisioned to be flexible enough to allow creativity to flourish within a structure and guidelines that allowed ISP programs to maintain their integrity.

Following this reasoning and the Catholic Social Teaching principle of subsidiarity, the founders endowed local ISP teams with much of the responsibility for managing themselves. Teams, animated by the leadership of their local coordinator, would manage and oversee the great majority of the planning and implementation of their local ISP programs. Today, the ISP Network office exists to support and encourage local ISP teams in their ministry efforts: to provide mission-focused formation, training and resource materials, to share guidance and best practices, and to aid and respond when a need emerges or as program integrity demands.

Below are some primary ISP volunteer roles (and definition of terms) to help you discern how you might wish serve as an ISP team member.

### *Program Roles*

- ***Retreat Participant:*** Individual experiencing homelessness and in recovery from addiction who participates in an ISP program.

- **ISP Team Member:** Individual who volunteers with a local ISP affiliate. Prospective volunteers apply via the ISP website and discern team membership and role with local leadership. ISP team members may serve in *leadership*, *direct service*, or *support* roles.

### Leadership Roles

The *Local Coordinator* and *Steward* are team members with a special role of leading their local ISP affiliate. The ISP Network works closely with the Coordinator and Steward as they develop their local ISP ministry and empower their ministry teams.

- **Local Coordinator:** Lead team member responsible for overseeing local ISP retreat programs, shelter partnerships, and retreat center relationships. The local coordinator also oversees volunteer recruitment, team development and formation (Please note: the Coordinator is expected to delegate significant responsibility to team members). Coordinator serves as the Network office's point of contact and, with the Steward, creates the annual program plan and budget. (See *Coordinator Resource Guide* for more information.)
- **Steward:** Team member who leads and supports local fundraising efforts in partnership with the ISP Network Office Development team. The Steward works closely with the Coordinator in financial support of their local ISP affiliate, and also in the annual budgeting process.
- **Institutional Affiliate Representative (IAs only):** Organizational lead for the ISP partnership. As the official representative of the sponsoring Institution, he/she agrees to serve as the formal liaison with the ISP Network office and assumes responsibility for recruiting, and supervising, local Coordinators.

### Direct Service Roles

Team members who interact directly with program participants by facilitating ISP retreats and spiritual programs.

- **Witness:** Team member in recovery from homelessness and addiction who has previously made an ISP retreat and returns on subsequent retreats to share his or her story for the benefit of participants. Witnesses serve a specialized role on the *retreat team*.
- **Facilitator:** Team member who volunteers in direct-service capacity to care for the spiritual needs of ISP program participants. Facilitators may serve in multiple roles, as discerned with the local coordinator. An individual must participate in an overnight retreat before taking on other team roles.

- ***Retreat Team:*** A small group of facilitators plus a witness that together lead an ISP retreat. Serving on the retreat team is the most common facilitator role.
- ***Ongoing Accompaniment Leader:*** Team member who takes responsibility for organizing and/or facilitating ongoing accompaniment sessions.
- ***Shelter Liaison:*** Team member who works with shelters and transitional housing/recovery homes to build relationships with case managers and encourage retreat participation. The shelter liaison builds rapport with case managers and potential retreat participants.
- ***Alumni Mentor:*** Team member who serves a special role in discerning with and accompanying new alum team members.
- ***Team Formation Leader:*** Team member who provides pastoral support to the ISP team by facilitating team formation gatherings and, in some cases, helping the team prepare for and debrief ISP programs.

### Support Volunteer Roles

Team members who assist their local ISP ministry in a support role.

- ***Driver:*** Team member who transports participants to ISP retreats and programs.
- ***Hospitality/supplies coordinator:*** Team member responsible for coordinating retreat supplies or gifts for participants (gift bags/quilts/art supplies, etc.).

While these are some common volunteer roles, it is important to note that ISP ministry teams may be organized in a variety of ways and not every team has designated individual(s) for these roles or may include roles not listed above. In general, ISP Affiliates tend to develop more specialized opportunities as they grow and develop. Please speak with your local Coordinator for more information on volunteer opportunities in your ISP Affiliate.

### Formation for Mission

To ensure that our participants receive the best possible care on retreat, ISP takes seriously the preparation of our volunteers. Retreat participants arrive with a certain vulnerability that demands volunteers proceed in a careful and thoughtful way. For this reason, ISP prepares its volunteers in two primary ways:

1. Every team member is enrolled in *Percipio*, ISP's online training, resource and ongoing formation platform. *Percipio* provides:
  - a) New volunteers access to the *New Volunteer Training Program (see pg. 15)*;

- b) ISP program materials and best practices for facilitators
  - c) Team formation resources for use at the local Affiliate level.
2. ISP Network-led team formation opportunities (*see pg. 16*)

### ***New Volunteer Training & Orientation***

- ***New Volunteer Process***

1. Prospective volunteer completes ISP Volunteer Application (accessed via website).
2. Network office forwards application to relevant local Coordinator.
3. Local Coordinator contacts and discerns with prospective volunteer.
4. *Percipio* online credentials and password sent to new volunteer.
5. Volunteer completes *Percipio's New Volunteer Training Program* and earns ISP Program Badge.
6. New volunteer shadows veteran team members on ISP retreat.

- ***New Volunteer Training Program***

The *New Volunteer Training Program* can be accessed via the *Percipio* online platform. This program is divided into 4 modules (Ignatian Spirituality; Homelessness; Addiction & Recovery; ISP Mission & Ministry) to help orient new volunteers to the ISP ministry. Upon completion of the training program, new volunteers earn their *ISP Program Badge* and become eligible to serve in a pastoral capacity.

The following volunteers are **required** to earn their ISP Program Badge ***before participating in ISP programs:***

- Those who will have **direct, pastoral contact** in any ISP retreat program (This includes all Direct Service roles such as Coordinator, Facilitator, Shelter Liaison, Ongoing Accompaniment Leader, Alumni Mentor, etc.)

The following are encouraged, but **not required** to earn their ISP Program Badge:

- Those in a Support Volunteer role (such as Drivers and Hospitality/Supplies Coordinators)

**[Note: Alumni team members** (men and women who have engaged with ISP as *retreat participants*) who wish to volunteer with ISP in direct service roles are eligible to participate in the 3-day Network Facilitator Retreat & receive their ISP Program Badge. This process can be found in *Percipio* (see: *Continuing Volunteer Formation → ISP Team Roles and Protocols*)

### ***Local-Led Team Formation***

- **Team Formation** gatherings are local-led meetings that help team members grow in their pastoral skills and understanding of the ISP mission and ministry. Our hope is that teams make a point of gathering on a quarterly basis. Teams can develop their own content for these gatherings, or use one of the Team Formation resources created by the Network (*see Percipio: Continuing Volunteer Formation → Team Formation*).
- **Witness Training** is a local-led training designed to train retreat alumni as ISP witnesses (*see Percipio: Continuing Volunteer Formation → Witness Training*).

### ***Network-Led Team Formation***

- **Annual Site Visit** is a yearly visit by ISP Network staff to each local City Affiliate that emphasizes pastoral formation and team-building opportunities. The ISP Regional Coordinator will work with the local Coordinator to plan a site visit that meets the team's needs and interests.
- **Network Leadership Conference** is an annual leadership and formation conference for Coordinators and Stewards, held in Chicago, usually in April.
- **Network Facilitator Retreat** is a two-day retreat in Chicago to orient and train alumni volunteers who want to become ISP retreat facilitators.
- **'Ambassadors of Hope'** is a two-year formation program that trains and empowers alumni team members who wish to serve as ISP leaders on the Network level. This program is currently in its pilot phase.

## **Organizational Policies**

### ***General Liability Information***

#### City Affiliates

The Midwest Jesuit Province maintains general liability insurance that covers ISP City Affiliate volunteers during ISP retreats and programs. At times, retreat facilities or other vendors may require a "Certificate of Insurance" (documentation of this insurance policy) as a condition of use. The ISP Network Office will provide this Certificate upon request.

#### Institutional Affiliates

ISP Institutional Affiliates agree to provide basic insurance and liability coverage for ISP programs as a term in their annual contract. If you are a volunteer serving in an ISP



Institutional Affiliate, you are covered under your sponsoring organization's insurance policy. Please ask your team coordinator for more information on your sponsoring organization's policies regarding car insurance and volunteer liability.

Regardless of whether you volunteer in a City or Institutional Affiliate, ISP requires all retreat participants to complete an ISP 'Emergency Waiver Form' (found on Percipio) prior to engaging in an overnight or follow up retreat. This document is designed to protect the ISP Network office from legal responsibility should an incident occur on retreat. For this reason, it is imperative that this be signed at the earliest opportunity, *preferably at the participant's residence, prior to being transported to the retreat center.*

As voluntary adults, all prospective retreat candidates must be free to attend and able to take responsibility for their own physical and mental health in order to participate in an ISP retreat. ISP team members may not take legal responsibility for a participant's health, behavior or overall well-being as a condition of engagement in our program. Any individual who needs a waiver to release him or her into another's care by court or medical order may not participate in an ISP overnight retreat.

ISP does not provide or procure childcare, eldercare, pet care or other related services as part of our program. Prospective program participants who are parents/guardians of minor children or primary caretakers for other dependents are responsible for making their own arrangements for those under their care in order to attend ISP programs.

### ***Transportation & Insurance Information***

#### City Affiliates

Though the Province maintains automobile liability insurance that will extend to ISP volunteer drivers, the volunteer's car insurance is the first and primary insurance to be claimed in the event of an incident. For this reason, drivers are required to purchase and maintain at least the minimum amount of insurance required by the State. ISP expects that all volunteers who are involved in transporting participants provide their insurance policy information in the initial volunteer application, and to update this information with the Network office as necessary.

Due to liability concerns, the ISP Network office discourages use of Uber, Lyft or other ride-sharing services to transport participants to and from ISP programs. In the event your team must rely on a ride-sharing service, *any participant(s) to be transported must sign an ISP waiver prior to getting in the vehicle* to protect ISP and volunteer team members from legal responsibility in case of accident or incident during transport.

## Institutional Affiliates

ISP liability and insurance policy does *not* extend to volunteers serving in ISP Institutional Affiliate programs. Please ask your team coordinator for more information on your sponsoring organization's policies regarding transportation policies and insurance coverage.

## ***Alcohol and Substance Use Policy***

### *Team Members*

Pursuant to the Drug-Free Workplace Act of 1988, and in special consideration of the population which ISP accompanies, alcohol and substance use will not be tolerated during an ISP retreat or affiliated program. Team members are prohibited from using, distributing, dispensing, or possessing alcohol, marijuana or intoxicating substances during ISP programs.

### *Participants*

Use of alcohol or other intoxicating substances are strictly prohibited on ISP overnight retreats. Any participant found to be using or distributing alcohol, marijuana or non-prescription controlled substances will be asked to leave the retreat immediately. Though rare, it is important to be aware and prepared for a situation. (See *Emergency Protocols* for appropriate protocol.) Medical or recreational marijuana is prohibited during all ISP programs due to its potential 'triggering' effect on other participants.

Historically, ISP has partnered primarily with sober-living facilities which prohibit clients from engaging in any alcohol or drug use as a condition of their residence. Many sober-living programs are steeped in 12 Step recovery principles, which dovetail well with the ISP approach. In recent years, however, as transitional housing and recovery programs across the country have adopted a 'Housing First' approach, ISP teams may find themselves encountering individuals who are still using substances, or are sober/abstinent but in a program or living environment that does not prohibit substance use. In these situations, the following guidelines apply:

- In general, individuals should be 3+ months sober from alcohol and illegal substances to attend an ISP overnight retreat. For the sake of creating a culture of safety and spirituality on our retreats as well as for liability reasons, ISP cannot allow anyone actively using alcohol, marijuana or other intoxicating substances to attend an overnight retreat.
- Individuals undergoing "medication assisted treatment" (MAT) as part of their recovery program (methodone, suboxone, etc.) are welcome to attend an overnight retreat if:

- A case manager recommends the individual as mature and stable in his or her recovery.
  - The individual may safely and responsibly bring their medication with them (and do not need to leave the retreat facility during retreat to take meds, e.g. go to a methadone clinic)
  - The individual takes responsibility for self-administering his or her prescription. *ISP team members may not take responsibility for holding or dispensing any medication on retreat.*
- Individuals not eligible to attend an overnight retreat may be invited to attend on-site ISP ongoing accompaniment (OA) programs. This decision remains at the discretion of team members and should be made in conjunction with his or her local team coordinator. Team members may not transport these individuals off-site at any time due to liability concerns.
  - Individuals engaged in “harm reduction”-based treatment programs that do not strictly prohibit use of alcohol/substances may participate in on-site OA programs so long as the OA group is informed in advance and their presence does not trigger other members. This decision remains at the discretion of team members and should be made in conjunction with his or her local team coordinator. Team members may not transport these individuals off-site at any time due to liability concerns.
  - As voluntary adults, all prospective retreat candidates must be able to take responsibility for their own physical and mental health while participating in an ISP retreat. ISP team members may not take legal responsibility for a participant’s health, behavior or overall well-being as a condition of engagement in our program. Any individual who needs a waiver to release him or her into another’s care by court or medical order may not participate in an ISP overnight retreat.
  - ISP team members are not required to be trained in EpiPen administration or opioid overdose reversal drug administration (Naloxone). In case of emergency, simply call 911. See *Emergency Protocols* for more information.

### ***Non-Discrimination Policy***

ISP does not discriminate in program or volunteer admission based on race, color, sexual orientation, gender, national origin, age, disability, or any other protected characteristic. ISP is founded and rooted in the Catholic tradition of the Society of Jesus; our program has a distinct heritage, however, individuals of all faith perspectives are welcome and encouraged to participate.

ISP will make reasonable accommodations for qualified individuals with known disabilities as long as the accommodation does not impose undue hardship on ISP.

Any team member with questions or concerns about any type of discrimination while volunteering with ISP should bring these issues to the attention of his or her local coordinator, or directly to Thomas Drexler, Executive Director. See *Anti-Harassment Policy* for more information.

## ***ISP Brand & Communications***

### **ISP Brand**

ISP team members have an obligation to guard the ISP “brand” with integrity and therefore may not use ISP’s name, logo, endorsement, services, or property for their personal advantage or for the advantage of others without the express written consent of ISP.

### **Communications**

ISP is committed to clear and consistent messaging across the Network, and as such works with affiliates to ensure communications pieces have a uniform tone, voice, and visual identity.

### **City Affiliates**

In collaboration with affiliate leadership, ISP will provide design and printing of the following: brochures, fliers, business cards, event invitations, and a city-specific web page (as part of larger ISP site rolled out in 2019). Volunteers may, if they desire, create: fliers for special audiences or events, print or e-newsletters, or other electronic communications, in accordance with the ISP Style Guide (also coming summer 2019). For any desired communications materials not listed above, please contact Catherine Ruffing Drotleff to discuss design of a new piece.

We request that you do not alter any materials which the Network Office creates; if changes are desired, ISP staff will make those edits in partnership with the affiliate. We further request that you collaborate with the Network Office on the creation and development of stand-alone videos or social media pages. Volunteers may not create ISP-related social media (i.e. “Facebook”) or other webpages without the express consent of the Network office.

### **Institutional Affiliates**

Upon request, the Network Office will provide the affiliate with ISP branded materials, logos and/or promotional materials and a copy of the ISP Style Guide in order to assist in development of co-branded communications devices. Institutional Affiliate programs may

not design their own ISP logo or “co-brand” by incorporating the ISP name or logo into a new brand identity.

Institutional Affiliates are strongly encouraged to communicate the ISP Network Office when applying for national or regional grants in order to avoid the possibility of multiple, competing ISP grant applications.

### ***Media Inquiries***

ISP will provide a response to media inquiries as soon as possible, generally within 24 hours of receipt. Volunteers should forward requests for information or comments from local media to Catherine Ruffing Drotleff, Director of Development & Communications, at 312-226-9184.

It is imperative that ISP speaks with one voice when responding to the media. Only designated staff members or Volunteers so designated by the Executive Director are to handle requests for interviews.

## **Team Member Policies**

### ***Appropriate Boundaries***

ISP team members are expected to maintain appropriate boundaries among fellow team members, program participants, ISP staff, and other colleagues. This includes, but is not limited to: 1) awareness of potential power imbalance between ISP participants and volunteers; 2) acting in an authentic manner consistent with ISP mission and values; 3) engaging with participants in a respectful and professional manner. Appropriate boundaries must always be maintained in the volunteer-participant relationship to safeguard our participants, and the integrity of the ISP program. If any concerns or questions arise, promptly contact your local team coordinator or ISP Regional Coordinator.

Moreover, ISP team members must always abide by all policies of referring agencies and facilities in which ISP operates. Failure to abide by these guidelines may result in dismissal from the volunteer team and prohibit future volunteer opportunities with ISP. (For more helpful information on boundary-related issues, see ‘Maintaining Boundaries’ in the online *New Volunteer Training*. Additional boundary-related information can be found under ‘Continuing Volunteer Formation’ on *Percipio*.)

### **Exchange of Money, Gifts or Services**

In order to ensure appropriate ministerial boundaries, *ISP team members are prohibited from giving, or accepting, money from program participants for any reason.* Team members may not provide any special goods or services to program participants (individual gifts, money,

items of value) that are not offered to all participants equally as a standard part of ISP programs (such as toiletries, quilts, gift cards, etc.) This policy is designed to protect the integrity of our programs and ISP volunteer experience and to avoid potentially inappropriate or exploitative situations.

Due to liability concerns, ISP team members may not provide or help to procure childcare, eldercare, pet care, or any other related services for program participants as part of their ISP volunteer service. Program participants who are parents of minor children or primary caretakers for other dependents are responsible for making their own arrangements for those under their care in order to attend ISP programs. (See also *'General Liability Information'*.)

Any questions about *Volunteer Boundaries* should be addressed to your local Team Coordinator, or ISP Regional Coordinator liaison for your ISP affiliate.

### ***Transportation***

As stated in the *Liability and Insurance* section of this document, all ISP team members who intend upon transporting retreat participants in their personal vehicles must: 1) have a current and valid driver's license; and 2) maintain at least minimum levels of personal insurance coverage as required by his or her State of residence. The team member must indicate and attest to this coverage as part of the application process. If a person is unwilling or unable to provide this information, he or she shall not transport individuals to a retreat or any ISP-affiliated program.

Due to liability concerns, the ISP Network office discourages use of Uber, Lyft or other ride-sharing services to transport participants to and from ISP programs. In the event your team must rely on a ride-sharing service, *any participant(s) to be transported must sign an ISP waiver prior to getting in the vehicle* to protect ISP and volunteer team members from legal responsibility in case of accident or incident during transport.

### ***Standards of Conduct***

#### **Mission and Values**

ISP team members are expected to conduct themselves in a way consistent with ISP's guiding mission and program goals. This at a minimum is to include: 1) honoring the dignity of participants, ISP staff, and other volunteer team members; 2) maintaining appropriate levels of confidentiality and privacy; 3) maintaining collegial relationships with fellow team members, ISP staff, and staff members at referring agencies; 4) maintaining responsible relationships to different communities of faith; 5) representing ISP in a way that maintains our mission and program integrity.

As representatives of ISP, team members are expected to guard the reputation of the organization, to portray a positive image of ISP, and to address issues and solve problems with respect and thoughtfulness. All interactions on behalf of ISP must portray the highest level of professionalism and integrity.

### **Confidentiality**

ISP team members are expected to maintain the confidentiality and privacy of all program participants and other team members by 1) protecting the identity of the participant and 2) keeping confidential all oral and written matters arising during the retreat program. This confidentiality policy does not apply when team members become aware of ongoing or impending physical harm to oneself or others, child abuse or elder abuse. In these cases, ISP team members are obliged to report program participants and/or volunteers engaged in such activities and may provide testimony to the proper authorities. (See *Safety & Safe Environment*.)

On an organizational level, ISP team members are required to respect the confidentiality of any information to which they may have access by virtue of their position as an ISP volunteer. Team members may not disclose any confidential information to anyone not authorized to receive such information or to use any such information without the express consent of ISP. Confidential information includes, but is not limited to, internal communications, information about and communications with ISP employees and volunteers, its business plans, contributor lists, mailing lists, marketing materials, or information about parties having business dealings with ISP.

### **Safety & Safe Environment**

In the event a volunteer experiences a threat to one's personal safety, inform the local authorities immediately (Call 911). Inform ISP Director of Programs as soon as possible by calling (312) 226-9184. Please see *Emergency Protocols* for guidance on managing other potential safety concerns.

ISP is committed to providing a safe environment and culture of safety where all are valued and honored as an individual created in the image and likeness of God. In rare cases, ISP team members may become aware through participant testimony of abuse of vulnerable persons.

The following testimony should be immediately reported to the ISP Director of Programs:

1. Impending harm, including credible plans involving physical harm to self or others
2. Current abuse of a minor, elder or vulnerable person

Stories of abuse that participants disclose about themselves that happened in the past can and should be held confidentially as a sacred part of the ISP retreat or affiliated program. If the team member reasonably suspects that something needs to be reported, he or she should take this course of action and proceed as directed:

1. Tell another member of the retreat team (ideally your local coordinator) and report what has just been disclosed.
2. Call ISP Central Office at 312-226-9184 and inform the Director of Programs.
3. Call the participant's referring agency and inform them of what has been disclosed.
4. Call the appropriate national hotline and make a report.

ISP team members are strongly encouraged to contact their Regional Coordinator or Director of Programs if ever unclear about whether what they've heard or experienced constitutes an abuse or reportable offense.

### **Conflict Resolution**

ISP team members are encouraged to work respectfully with fellow colleagues and to give suggestions, improve processes, promote ethical conduct and report unsafe, unacceptable or illegal practices without fear of retaliation. As with any human community, disagreements and conflicts can potentially arise during participation on your ISP team. Volunteers are encouraged to resolve disagreements informally whenever possible. Except in the case of fraud, gross negligence, or other criminal activity, team members are encouraged to first bring any issues to his or her local coordinator. If no resolution is forthcoming, you may contact your designated Regional Coordinator.

### **Anti-Harassment Policy**

ISP strives to promote a productive and safe work and volunteer environment and does not tolerate unlawful harassment, including verbal or physical conduct, which harasses, disrupts, or creates an intimidating, offensive, or hostile environment, especially if such conduct concerns gender, sex, race, color, marital status, religion, ancestry, age, disability, national origin, sexual orientation, or veteran status.

Sexual harassment is specifically defined as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature and can take many forms, including verbal, nonverbal, physical, visual or textual/electronic.

Any ISP team member who believes himself or herself to be the object of sexual harassment or who observes another person being subjected to sexual harassment, is encouraged to bring the incident to the attention the local ISP team coordinator or directly to Thomas Drexler, ISP Executive Director. Any ISP team member who is found to have violated the prohibition on sexual harassment, or knowingly makes a false report regarding sexual harassment, will have their volunteer status terminated immediately.

### **Social Media Use**

ISP realizes that many of its volunteers may participate in social media as a way to share their life experiences and thoughts with family, friends, and colleagues. [Social media includes all means of communicating or posting information or content on the Internet, including to a



volunteer's own or someone else's 'blog,' journal or diary, personal website, social networking or affinity web site, web bulletin board or chat room, whether or not associated or affiliated with ISP, as well as any other form of electronic communication.]

ISP requires its volunteers to use all forms of social media in a responsible manner. A volunteer may *never*:

- post photos or other personal information about ISP participants on social media without the express consent of the ISP Network office.
- use social media to post complaints or criticisms about ISP programs, staff, participants or fellow team members. Examples of such conduct might include posts meant to intentionally harm someone's reputation or made on the basis of race, sex, national origin, sexual orientation, disability, religion, or any other status protected by law or ISP policy.

If ISP is a subject of a team member's social media content, that team member must be clear about the fact that s/he is a volunteer and that his/her views do not represent those of ISP.

As use of social media involves certain risks, ISP requires all volunteer team members to exercise certain responsibilities. Thus, any volunteer's social media conduct that adversely affects his or her service as an ISP volunteer, the work of other volunteers or staff, or any individuals who work on behalf of or in connection with ISP, such as housing programs and facilities, suppliers, vendors, etc., may result in disciplinary action up to and including termination as a volunteer.

### ***Financial Policies***

Participation within ISP is considered, unless uniquely specified at the written discretion of the Executive Director, to be entirely and solely voluntary. By completing the application and acknowledging the receipt of this Handbook, team members agree that compensation or remuneration for work in support of ISP or any affiliated programs is not expected. Contributions (e.g., "dues") are not required by ISP to participate in any programs.

### **City Affiliates**

Team members are expected to be good stewards of ISP resources as our finances arise from the generosity of ISP benefactors. Team members, like participants, shall not benefit financially or commercially as the result of the team member's status with ISP. Team members shall not lend money or give gifts (monetary or otherwise) to participants.

Fiscal oversight and maintenance of ISP fiscal agency is generally considered the task of the ISP Network Office. Solicitation of funds and financial reporting should only be done in

conjunction with, and at the discretion of, the Director of Development and/or Executive Director.

### **Reimbursement Policy (for City Affiliates only)**

ISP will make every reasonable effort to cover out of pocket expenses incurred by team members on an overnight retreat or affiliated program (e.g. travel, food, etc.). With the approval of the local coordinator, and as allowed for in the City Affiliate's annual ISP budget, costs paid directly by a team member may be reimbursed by the ISP Network Office. Team members are expected to submit expenses to their Regional Coordinator in a timely manner with appropriate receipts attached. Expenses submitted more than six weeks (45 days) after the expense was incurred, or without appropriate documentation, cannot be reimbursed.

If necessary and appropriately requested, ISP will reimburse for transportation expenses incurred in support of a retreat or affiliated program. ISP will reimburse at the current IRS rate for miles driven in support of a charitable program (at publication, rate is 14 cents per mile).

Team members may make "in-kind" donations, the monetary value of which will be applied to the City Affiliate's budget. When making "in-kind" donations, team members must provide appropriate receipts/documentation within six weeks of the donation in order to receive a letter for tax purposes and for credit to be applied to their local affiliate.

### Institutional Affiliates

Team members volunteering within ISP Institutional Affiliates are not eligible to receive reimbursement from ISP for any expenses incurred during ISP retreats or affiliated programs. Such reimbursements fall under the purview of the ISP sponsor organization and their financial policies with respect to volunteers. Please ask your local coordinator or Institutional Affiliate Director for more information.

### ***Dismissal and Voluntary Withdrawal***

#### **Dismissal**

ISP reserves the right to dismiss anyone from the program at any time, at the discretion of the Executive Director. Dismissal from ISP includes removal from, and immediate cessation of, any ISP programs or affiliated programs, and prohibits future involvement with any ISP programs or affiliated programs.

A volunteer may be dismissed from participation in ISP programs for one or more of the following reasons, which includes but is not limited to:

- Conducting oneself in a manner deemed as morally or ethically offensive.
- Disregarding the guiding philosophy and mission of ISP or any programs/agencies with which ISP is affiliated.
- Demonstrating a pattern of failure to conduct oneself in a way commensurate with ISP's guiding philosophy, mission, and generally agreed upon best practices.
- Having any serious physical or emotional problems which inhibit one from being able to reasonably engage with the mission of ISP.
- Decision by the Executive Director that the volunteer is not upholding or observing the policies and standards of ISP as outlined in this Handbook.

### **Voluntary Withdrawal**

If an ISP team member is considering leaving ISP due to concerns about his or her team or the program, she or he is encouraged to discuss their concerns with their local coordinator first to see if a solution or accommodation might be possible. Regardless of reasons for withdrawal, participation with ISP is considered entirely voluntary; ISP in no way compels a volunteer to remain connected with the team and ISP will respect the final decision of the volunteer.

### **Emergency Protocols**

Situations requiring emergency intervention have occurred in extremely rare circumstances. While ISP does not anticipate any of the situations described below, team members are encouraged to prepare for and understand how to respond in any potential crisis that may emerge during participation in an ISP Retreat or affiliated program.

### **Medical**

In the event an acute medical emergency occurs on an ISP retreat or affiliated program involving a participant or team member other responsible team members should:

1. Assess the situation and determine the most appropriate course of action.
2. Call 911 to summon an ambulance if necessary. If the person is non-responsive, it will be important to inform the EMTs/medical authorities of any prescriptions, medical conditions or allergies listed on the individual's "Emergency Contact Form."
3. Remain calm; assist authorities as much as possible by following their directives; and document as much of the situation as possible.
4. Inform ISP Director of Programs as soon as possible.
5. When appropriate, the ISP Director of Programs or your local coordinator will inform the designated Emergency Contact.

ISP team members are not required to be trained in EpiPen administration, or opioid overdose reversal drug administration (Naloxone). In case of suspected overdose, simply call 911.

Rarely, a participant suffering from a mental, emotional or behavioral disorder will become disruptive on an overnight retreat. For the safety and wellbeing of the other participants and facilitators, it is strongly advised to remove the participant from the retreat as soon as possible. If immediate transport isn't possible, the participant should be asked to stay in their room until departure; he or she may not join in any retreat activities, including meals. Food can be brought to the participant's room if necessary.

To ensure the safety of our volunteers, we require that **two (2) team members** be present in the vehicle when transporting a participant home early for behavioral or non-compliance issues. (This is not required when transporting a participant home early due to physical illness.) The lead team member should alert the referring housing/recovery program of the situation so they are aware and ready to greet the individual upon arrival. In general, ISP team members should use their best judgment whether it is safe and reasonable to transport participants who become problematic. As an ISP team member, you have the right to refuse to drive an individual if you feel uncomfortable doing so. In this case, it is appropriate to call the referring agency to see if they will come and pick up the individual.

If a participant becomes verbally abusive or begins acting in a violent or threatening way, the lead team member should call 911 and have the individual removed by the police. The participant's referring agency should be notified immediately.

### **Weather-Related**

In the event of a severe weather emergency, fire or other natural disaster, follow the broadcasted advice of authorities (e.g., "take cover"), or otherwise follow posted evacuation plans. When appropriate, and as soon as possible, inform your local coordinator and the ISP Director of Programs of the emergency.

### **Transportation**

In the event an accident occurs while transporting a participant to or from an ISP retreat or affiliated program, follow these procedures:

1. Assess the situation and inform the proper authorities (Call 911) with any immediate medical emergencies.
2. Call the local Police Department and request a report be taken.
3. Exchange insurance information with the driver of the other vehicle.
4. Call other team members and referring agencies to inform them of the situation.
5. Call the ISP Director of Programs and provide the following details:
  - a. Police report number, including any citations which were issued
  - b. Date, Time, Location of Incident
  - c. Persons involved
  - d. General description of incident

## **Substance Use/Non-compliance**

Use of alcohol, marijuana or other intoxicating substances are strictly prohibited on ISP overnight retreats. Any participant found or suspected of using or distributing alcohol or controlled substances or otherwise acting in a disruptive, non-compliant manner must be transported home immediately. To ensure the safety of our volunteers, we require that **two (2) team members** be present in the vehicle when transporting a participant home early for reasons of substance use or non-compliance. Team members should alert the referring housing/recovery program of the situation so they are aware and ready to greet the individual upon arrival.

For the safety and wellbeing of the other participants and facilitators, it is strongly advised to remove the problematic participant from the retreat as soon as possible. If immediate transport isn't possible, the participant should be asked to stay in their room until departure; they may not join in any retreat activities, including meals. Food can be brought to the participant's room if necessary.

If a participant becomes verbally abusive or begins acting in a violent or threatening way, the lead team member should call 911 and have the individual removed by the police. The participant's referring agency should be notified immediately.

## ***Volunteer Waiver of Liability and Consent to Release***

As a volunteer team member, I consent to participation in ISP retreat and affiliated programs and voluntarily and willingly assume all responsibility for all risks and dangers associated with my participation. As a volunteer, I agree to be responsible financially for any losses resulting from my actions and will indemnify ISP, and its officers, directors, employees and agents, from any loss or damage I may cause during ISP retreats or affiliated programs. In consideration of this, I hereby waive all claims and causes of action against ISP, and its officers, directors, employees and agents and hereby hold harmless these individuals from all liability except such loss or damage which was caused by the sole negligence or willful misconduct by the aforementioned.

I consent and give permission to ISP to photograph or otherwise use my likeness in connection with any ISP activities for promotional purposes. I understand that any such photographs and likenesses and all rights associated with them will belong solely and exclusively to ISP, which shall have the absolute right to copyright, reproduce, alter, display, distribute, destroy, and/or publish them in any form including, but not limited to, print, electronic, video, and/or Internet. I agree to waive any and all rights with respect to any such photographs or likenesses including compensation, copyright, and privacy rights and any right to inspect or approve such photographs or likenesses and/or copy, print, or other materials that may be used in

connection with them. I hereby release and discharge, and agree to hold harmless, ISP, its officers, agents and employees, and all persons acting under its permission or authority, from any claims and liability in connection with such photographs, accounts, or likenesses and/or their use.

I agree to this statement, understanding the terms used in it and their legal significance. I waive and release the right to legal recourse against ISP, and its officers, directors, employees and agents, knowingly released in return for allowing my participation in ISP retreats or affiliated programs. My signature on the receipt and acknowledgment page is intended to bind into perpetuity not only myself but also any successors, heirs, representatives, administrators, or assigns.

### **Acknowledgement and Receipt**

I acknowledge that I have received a copy of the ISP Handbook. I have read and understand the contents of this Handbook and will act in accord with these policies and procedures as a condition of volunteering with ISP.

Please read this Handbook carefully before you sign this document.

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Volunteer Name (Please Print)

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Volunteer Signature

Date