



#### Ironstone Farm Program Affiliations

Anne Sullivan Center EIP  
ARC of East Middlesex  
Cambridge-Somerville EIP  
Cape Ann EIP  
Central Middlesex ARC  
Charles River EI  
Eliot Tri City EIP  
Family Support EIP  
Fidelity House  
First EI  
Harbor Area EI  
Haverhill Alternative School  
Lawrence Boys & Girls Club  
The Learning Center  
Life Links  
Lowell General Hospital  
Lucy's Love Bus  
Massachusetts Comm. for the Blind  
Mass. Dept. of Mental Health  
MSPCC  
Mystic Valley EIP  
North Shore ARC  
North Shore EIP  
Pentucket Area EI  
Project Beam EI  
Region 10 Community Support  
School for Exceptional Studies  
Seven Hills Community Services  
SoulWorks Coaching  
Thom Boston-Metro EIP  
Till, Inc.  
University of New Hampshire  
Wakefield Public Schools  
Wayside Beaverbrook Counseling

#### Ironstone Farm Volunteer Affiliations

Andover High School  
Andover Rotary Club  
Buckingham, Browne and Nichols  
Essex Agricultural and Tech. H.S.  
Greater Lawrence Tech. School  
Greater Lawrence Kiwanis Club  
Innovation Charter School  
Lowell High School  
Merrimack College  
Middlesex Community College  
North Shore Community College  
Northeastern University  
Northern Essex Community College  
Notre Dame Cristo Rey High School  
Phillips Andover Academy  
Salem State College  
University of Massachusetts Lowell

Hello,

Thank you for your interest in the volunteer program at Ironstone Farm! Volunteers 13 years and older are needed Monday through Saturday, year round, and are asked to commit to between 1-3 hours each week. While we do not require a long-term commitment, those individuals that are willing to commit to a longer schedule will be given priority for training and scheduling.

Please complete and return the enclosed forms. Once we receive your completed packet, we will acknowledge receipt and place your name on the wait list for a Volunteer Training Workshop. Workshops are held by invitation only. We schedule interested individuals into workshops based on our current needs and your availability (the more flexible you are, the sooner you will attend a workshop). If you are very limited on your availability, it may take some time to find an opening for you.

#### INSTRUCTIONS

Return the following forms completed and signed where required:

1. Volunteer Application and Schedule of Availability (must be signed by both parent and volunteer when the volunteer is under 18)
2. Volunteer Emergency Authorization, Assumption of Risks & Liability Release Agreement (must be signed by both parent and volunteer when the volunteer is under 18)
3. Signature page ONLY for the Code of Ethics and Conflict of Interest Policy. Please do not submit the entire handout.
4. **Only volunteers age 17 or older:** Both the SORI and CORI background check forms are required. On the SORI form, **only the Subject section** should be completed.

When you attend a workshop, remember, this is a working farm and you should dress appropriately for the weather and for walking around in a farm environment. Boots or sneakers, coats, hats, gloves, and rain gear are highly recommended. During the workshop you will be actively working with our horses.

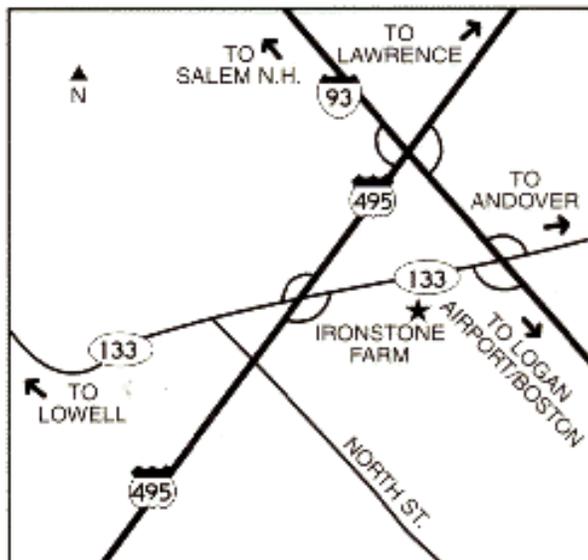
If you have any questions please do not hesitate to contact me by phone or email. If you are interested in seeing the farm first, please call me to schedule a tour. We offer tours Monday-Friday during the office hours of 10:00-6:00.

Sincerely,

A handwritten signature in blue ink that reads "Kay Milligan".

Kay Milligan  
Director of Volunteers  
[volunteer@challengeunlimited.org](mailto:volunteer@challengeunlimited.org)

## Directions to Ironstone Farm



450 Lowell St. (133)  
Andover, MA 01810  
(978) 475-4056

### From Interstate Rte. 93 N

Going **North** on I 93, take **Rte. 133, Andover, (Exit #43)**.  
Take a **Left** from exit ramp onto **Rte. 133 West**.  
Follow for 1.3 miles, through two sets of lights,  
to Ironstone Farm, on **Left**.

Please turn **Left** at the green cascading sign  
and go down the lane to the parking lot.  
Please check in at the red Welcome Center  
at the end of the lot.

### From I 93 S

**Take Rte. 133 (Exit #43)** going West toward Tewksbury.  
Follow for 1.3 miles, through two sets of lights, to Ironstone Farm, on **Left**.

Please turn **Left** at the green cascading sign and go down the lane to the  
parking lot. Please check in at the red Welcome Center at the end of the lot.

### From 495 N

**Take Exit Rte. 133 (Exit #39)** Tewksbury.  
**Right** off ramp onto Rte 133, going east.  
Ironstone Farm is 1 mile down on **right** (*3rd driveway past the 99 Restaurant.*)  
Please go past the stone pillars that read "Ironstone Farm" and turn Right into the  
entrance at the green cascading sign.

### From 495 S

**Take Rte 93 S** toward Boston. Follow directions above for 93S.





## **IRONSTONE FARM SAFETY REGULATIONS PLEASE READ CAREFULLY**

The following regulations have been established for your safety and the safety of all involved in the activities at Ironstone Farm. Please make every effort to abide by them during your time on the premises.

**SMOKING:** There is **NO SMOKING** allowed on the property of Ironstone Farm.

**CHILDREN:** Ironstone is a working farm. We must insist that all children, when not involved in a lesson, remain beside their accompanying adult. Running, yelling, or unaccompanied children can create hazardous situations – for themselves, riders, handlers, staff, and other visitors at the farm. Please observe – or ask about – designated areas for viewing lessons. If children behave in an unsafe manner, we may ask you to remove them from the premises.

**PETS and SERVICE ANIMALS:** The animals at Ironstone Farm live in harmony with one another and introduction of a new animal is handled very carefully. Visiting pets will upset this harmony and can be very disruptive, creating an unsafe situation. Please leave your pet(s) at home. With regards to service animals, please check with the office before visiting the farm.

**TREATS:** Our animals are on a routine feeding schedule. Their daily intake is carefully monitored. Treats may be harmful to some animals. Also, handfeeding encourages the animals to bite in search of treats and can be dangerous. Please do not feed the animals. If you would like to bring treats for your favorite Ironstone critter, you may label the treat and it will be included in his/her dinner or breakfast.

**PARKING:** Please **park in designated areas only**. Observe the “No Parking” signs and spaces allotted for pick-up and drop-off of clients. Please do not sound your horn or set car alarms while on Ironstone Farm property – sudden loud noises may frighten the animals residing at the farm as well as clients participating in therapy.

**UMBRELLAS:** Please do not use umbrellas on the property. The odd shape and sudden movement of opening/closing an umbrella can startle our horses.

**THE BARN:** The upper barn is a staff-only area. If you need to reach someone in the Barn office, please call us at 978-475-4056 or ask the Welcome Center to contact us for you.

**OBSERVATION:** Our instructors and therapists are trained professionals. Please remain outside the teaching area during lessons. You are invited to watch from designated areas.

**Paddock:** Only Staff, Working Students, and Feeders (all of whom must have Paddock Privileges) are allowed in the Paddocks. **Volunteers and visitors are not allowed to enter the Paddocks for any reason.**

*We appreciate your patronage. We pledge to offer you the best in quality, horse-related, and therapeutic programming. During your time spent with us, we ask that you have respect for the property, the animals and the staff.*

*Thank you!*

Volunteer Application and Schedule Availability 2019



Thank you for your interest in volunteering at Ironstone Farm! Please complete the following Application and Schedule and mail or fax it back to us with the other documents enclosed that require completion.

Name: \_\_\_\_\_  Male  Female Date of Birth\*: \_\_\_\_/\_\_\_\_/\_\_\_\_  
(\*must be 13 to submit application and attend a workshop)

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Occupation: \_\_\_\_\_ Place of Business: \_\_\_\_\_

School Status: \_\_\_\_\_ School Name & Location: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Email address (please print neatly): \_\_\_\_\_  
(Note: if you give us your email address please expect to receive periodic emails from us, including scheduling)

Best way and time to contact you? \_\_\_\_\_

Do you have any health issues, diagnoses or physical limitations that would make the responsibility of leading or sidewalking difficult for you? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, please explain:  
\_\_\_\_\_  
\_\_\_\_\_

Are you able to walk for 1-3 hours and jog alongside a trotting horse a short distances? Yes \_\_\_\_\_ No \_\_\_\_\_

Are you able to hold your arm above shoulder height and support a rider's weight (when given a chance to switch sides)? Yes \_\_\_\_\_ No \_\_\_\_\_

Have you ever been convicted of a criminal offense? Yes \_\_\_\_\_ No \_\_\_\_\_ If yes, when? \_\_\_\_\_

Where? \_\_\_\_\_ Briefly explain: \_\_\_\_\_

How did you hear about the volunteer program at Ironstone Farm?  
(e.g., word-of-mouth, flyer, friend, newspaper, Internet, VolunteerMatch, Idealist.org, Senior Corps, City Corps, etc.)  
\_\_\_\_\_  
\_\_\_\_\_

Have you volunteered at Ironstone Farm in the past? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, what were the approximate dates of attendance? \_\_\_\_\_

Is your volunteer experience a school, college, organization, or company requirement? Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, please indicate the number of hours you must complete and the time frame that you need to complete the hours along with any other pertinent information that we should know about your community service requirement.  
\_\_\_\_\_

## Volunteer Application and Schedule Availability 2019

Tell us about your experiences with:

Horses: \_\_\_\_\_

Leading/Sidewalking: \_\_\_\_\_

People with Disabilities: \_\_\_\_\_

What interests you about becoming a volunteer at Ironstone Farm? \_\_\_\_\_

Do you have any special skills/talents that you would be interested in sharing with the Ironstone Farm programs (e.g., sign language, carpentry, photography, baking, grant writing, foreign language, and special events)?

### VOLUNTEER AVAILABILITY:

Please indicate (with a checkmark) the days and times you are available to volunteer. This will aid the volunteer team in scheduling you into a training workshop. The minimum volunteer time is 1 hour. Volunteer sessions are typically 1.5-3 hours in length. Most volunteers are expected to commit to a weekly schedule, but if your schedule changes week to week or month to month, please note that below.

	Morning (9:00AM-12:00PM)	Mid-Day (11:00AM-2:00 PM)	Afternoon (3:00PM-5:00PM)	Evening (5:00PM-7:30PM)	Other Times
<b>M</b>					
<b>T</b>					
<b>W</b>					
<b>Th</b>					
<b>Fr</b>					
<b>Sat</b>				<b>CLOSED</b>	

**Scheduling Notes that you feel are pertinent to share. Please feel free to state the times other than above that work best for your schedule.**

---



---



---



---



---



---

**Volunteer Application and Schedule Availability 2019**

Individuals are scheduled into training workshops when your availability to volunteer matches our current needs. We strive to bring you for training as quickly as possible! Please be sure to take your work, sports, and/or school schedule into consideration. Do not hesitate to contact the Volunteer Team with any questions or unique circumstances regarding your schedule. Thank you for taking the time to complete this application. We look forward to meeting you in a workshop.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

(Parent or guardian must also sign if applicant is under 18 yrs of age)

**SIGNATURES MUST BE HANDWRITTEN. PLEASE PRINT AND SIGN.**

-----  
**OFFICE USE ONLY:**

Application Received: \_\_\_\_\_ Contacted: \_\_\_\_\_ Workshop Date: \_\_\_\_\_

Forms:  Volunteer Emergency Release  Code of Ethics  SORI/CORI

Workshop successfully completed: \_\_\_\_\_

**Challenge Unlimited, Inc. at Ironstone Farm  
450 Lowell St.  
Andover, MA 01810  
978.475.4056 (Tel) 978.475.4046 (Fax)  
volunteer@challengeunlimited.org  
www.ironstonefarm.org**

**2019 Volunteer Emergency Authorization  
Assumption Of Risks & Liability Release Agreement  
Ironstone Farm; Challenge Unlimited, Inc.; & Ironstone Therapy, Inc.**

Name: \_\_\_\_\_  Male  Female Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email Address: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Occupation & Place of Business; or School (Name & Location); or Not Applicable: \_\_\_\_\_

Do you have any health issues, diagnoses or physical limitations? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please explain: \_\_\_\_\_

**Important: All Volunteers /Parent or Guardian Must Complete:** Volunteers groom and tack horses in preparation for a session, and then lead horses during a therapy /riding session (controlling the horse at all times) or act as a side walker for mounted participants (physically supporting the rider or acting as a spotter). Do you (volunteer) have any conditions that may prohibit you from fully carrying out these important responsibilities?

Yes \_\_\_\_\_ No \_\_\_\_\_ If Yes, please describe: \_\_\_\_\_

**EMERGENCY CONTACT INFORMATION** *REQUIRED FOR ALL VOLUNTEERS*

Name: \_\_\_\_\_ Relation: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Relation: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

**PARENT/GUARDIAN CONTACT INFORMATION**  
*PLEASE COMPLETE IF VOLUNTEER IS UNDER 18 YEARS OF AGE*

Name of parent(s)/guardian(s): \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

**PLEASE READ THE FOLLOWING THREE PARAGRAPHS CAREFULLY**

Inherent Risk / Assumption of Risks. I/We acknowledge that: Risks, conditions and dangers are inherent in (meaning an integral part of) horse/equine/animal activities, regardless of all feasible safety measures which can be taken, and I agree to assume them. The inherent risks include, but are not limited to any of the following: the propensity of an animal to behave in ways that may result in injury, harm, death or loss to persons on or around the animal; the unpredictability of an equine's reaction to sounds, sudden movement, unfamiliar objects, persons or other animals; hazards, including but not limited to, surface or subsurface conditions, a collision, encounter and/or confrontation with another equine, another animal, a person

**2019 Volunteer Emergency Authorization  
Assumption Of Risks & Liability Release Agreement**

**Ironstone Farm; Challenge Unlimited, Inc.; & Ironstone Therapy, Inc.**

or an object; the potential of an equine activity participant to act in a negligent manner that may contribute to injury, harm, death, or loss to the participant or to other persons, including but not limited to, failing to maintain control over an equine and or failing to act within the ability of the participant. If a horse is frightened or provoked it may divert from its training and act according to its natural survival instincts which may include, but are not limited to, stopping short; spinning around; changing directions and or speed at will; shifting its weight; bucking; rearing; kicking; biting; and or running from danger. I/We also acknowledge that these are just some of the risks and I/We agree to assume others not mentioned above. I/We am (are) not relying on Challenge Unlimited, Inc., Ironstone Therapy, Inc. and/or Ironstone Farm to list all possible risks for me.

**Liability Release.** I/We agree that: in consideration of allowing my participation in the activities of Challenge Unlimited, Ironstone Therapy and/or Ironstone Farm, I, the student, client or volunteer, for myself and on behalf of my child and/or legal ward, heirs, administrators, personal representatives or assigns, do agree to release, hold harmless, and discharge Challenge Unlimited, Inc., Ironstone Therapy, Inc. and Ironstone Farm, its employees, agents, independent contractors, officers, directors, representatives, assigns, members, and insurers, and others acting on their behalf, of and from all claims, demands, causes of action and legal liability, whether the same be known or unknown, anticipated or unanticipated, due to ordinary negligence or legal liability; and I do agree to release any claims, demands, legal actions and causes of action, against Challenge Unlimited, Inc., Ironstone Therapy, Inc. or Ironstone Farm, and its employees, agents, independent contractors, officers, directors, representatives, assigns, members, and insurers, for any damages due to bodily injury and/or death and/or property damage, sustained by me and or my minor child or legal ward in relation to the premises and operations herein, including, but not limited to, riding, driving, training, handling or otherwise being near or around horses owned, leased or boarded by Challenge Unlimited, Inc., Ironstone Therapy, Inc., or Ironstone Farm.

**WARNING**

**Under Massachusetts law, an equine professional is not liable for injury to, or death of, a participant in equine activities resulting from the inherent risks of equine activities, pursuant to Section 2D of Chapter 128 of the Massachusetts General Laws.**

**Policy of Confidentiality:** Confidentiality is defined as “told in secret or private relations; trusted.” Any information in regards to the participants (clients) of Challenge Unlimited, Inc., Ironstone Therapy, Inc., and/or Ironstone Farm must be held in strict confidentiality. It is critical that we respect each individual. Confidentiality is considered one of the most basic responsibilities of our facility. In failure to abide by this policy, the quality of the services we provide may diminish and result in legal ramifications.

➡ \_\_\_\_\_ I understand and agree to the above.

**SORI/CORI:** If determined to be necessary the administration staff at Challenge Unlimited, Inc., Ironstone Therapy, Inc., and/or Ironstone Farm reserves the right to perform a SORI (sexual offender register inquiry) and/or CORI (criminal offender register inquiry) check on all volunteers.

**Photo Release:** I hereby consent to and authorize the use and reproduction by Challenge Unlimited, Inc., Ironstone Therapy, Inc., and/or Ironstone Farm of any and all photographs and any other audiovisual materials taken of me/my child/my ward for promotional material, educational activities, and exhibitions or for any other use for the benefit of the program. ➡ Opt out: No, I do not consent. \_\_\_\_\_

**I/We represent that I/We have read this entire agreement and in particular the sections labeled  
Inherent Risk/Assumption of Risks, Liability Release and Warning.**

➡ \_\_\_\_\_  
(Signature of Volunteer)

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

➡ \_\_\_\_\_  
(Signature of Parent/Guardian if Volunteer is under 18 yrs of age)

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

**SIGNATURES MUST BE HANDWRITTEN. PLEASE PRINT AND SIGN.**

**Challenge Unlimited, Inc. @ Ironstone Farm  
450 Lowell St.  
Andover, MA 01810  
978-475-4056**

**CRIMINAL OFFENDER RECORD INFORMATION (CORI)  
ACKNOWLEDGEMENT FORM**

TO BE USED BY ORGANIZATIONS CONDUCTING CORI CHECKS FOR EMPLOYMENT, VOLUNTEER, SUBCONTRACTOR, LICENSING, AND HOUSING PURPOSES.

Challenge Unlimited, Inc. is registered under the provisions of M.G.L. c. 6, § 172 to receive CORI for the purpose of screening current and otherwise qualified prospective employees, subcontractors, volunteers, license applicants, current licensees, and applicants for the rental or lease of housing.

As a prospective or current employee, subcontractor, volunteer, license applicant, current licensee, or applicant for the rental or lease of housing, I understand that a CORI check will be submitted for my personal information to the DCJIS. I hereby acknowledge and provide permission to Challenge Unlimited, Inc. to submit a CORI check for my information to the DCJIS. This authorization is valid for one year from the date of my signature. I may withdraw this authorization at any time by providing Challenge Unlimited, Inc. written notice of my intent to withdraw consent to a CORI check.

FOR EMPLOYMENT, VOLUNTEER, AND LICENSING PURPOSE ONLY:

Challenge Unlimited, Inc. may conduct subsequent CORI checks within one year of the date this Form was signed by me provided, however, that Challenge Unlimited, Inc. must first provide me with written notice of this check.

By signing below, I provide my consent to a CORI check and acknowledge that the information provided on Page 2 of this Acknowledgement Form is true and accurate.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

SUBJECT INFORMATION:

---

\*Last Name                      \*First Name                      Middle Name                      Suffix

---

Maiden Name (or other name(s) by which you have been known)

---

Date of Birth                      Place of Birth

\*Last Six Digits of Your Social Security Number: \_\_\_\_\_ - \_\_\_\_\_

Sex: \_\_\_\_      Height: \_\_\_\_ ft. \_\_\_\_ in.      Eye Color: \_\_\_\_\_      Race: \_\_\_\_\_

Driver's License or ID Number: \_\_\_\_\_      State of Issue: \_\_\_\_\_

---

Mother's Full Maiden Name                      Father's Full Name

Current and Former Addresses:

---

Street Number & Name                      City/Town                      State                      Zip

---

Street Number & Name                      City/Town                      State                      Zip

---

The above information was verified by reviewing the following form(s) of government-issued identification:

\_\_\_\_\_

\_\_\_\_\_

VERIFIED BY: \_\_\_\_\_

Name of Verifying Employee (Please Print)

\_\_\_\_\_

Signature of Verifying Employee



# CHALLENGE UNLIMITED, INC. CODE OF ETHICS AND CONFLICT OF INTEREST POLICY

---

## Code of Ethics

### I. Personal and Professional Integrity

All Challenge Unlimited, Inc. employees, board members and volunteers shall act with honesty and integrity, and will abide by this Code of Ethics and Conflict of Interest Policy (hereinafter referred to as the “Policy”) at all times in their dealings on behalf of the organization and its various programs and endeavors. All Board members, employees and volunteers will receive a copy of this Code of Ethics and Conflict of Interest Policy at the date of hire, Board election or commencement of volunteer service, and on an annual basis thereafter, and shall sign a statement acknowledging their agreement to follow this Policy.

### II. Mission

Challenge Unlimited, Inc. has a clearly stated charitable mission that has been approved by its Board of Directors:

To provide and promote educational, therapeutic, athletic and recreational services for individuals with disabilities and to provide educational and recreational activities using horses and the working farm environment for people with and without disabilities.

This mission is responsive to the families and children that are the recipients of the services provided by the organization.

### III. Governance

Challenge Unlimited, Inc. has an active Board of Directors that is responsible for setting the mission and strategic direction of the organization, and for oversight of the organization’s finances, operations and policies.

The Board of Directors, in addition to its other responsibilities and duties:

- Ensures that its members have the requisite skills and experience to carry out their duties and that they understand and fulfill their governance duties acting for the benefit of the organization and its public purpose;

- Has a conflict of interest policy (which is set forth herein) that ensures that any conflicts of interest or the appearance thereof are avoided or appropriately managed through disclosure, recusal or other means;
- Is responsible for the hiring, disciplining and regular review of the performance of the Executive Director and all senior staff, and ensures that their compensation is reasonable and appropriate in light of the overall finances of the organization;
- Implements policies requiring the organization to be inclusive and not engage in discriminatory conduct in its policies and practices for all board, staff and volunteer positions;
- Ensures that the Executive Director and appropriate staff provide the Board with timely and comprehensive information to enable it to effectively carry out its duties;
- Ensures that the organization and its Board members conducts transactions and dealings with integrity and honesty, and fulfills all fiduciary duties;
- Ensures that the organization promotes working relationships with Board members, staff, volunteers and program beneficiaries that are based on mutual respect and fairness;
- Ensures that the resources of the organization are responsibly and prudently managed; and
- Ensures that the organization has the capacity to effectively carry out its programs.

#### IV. Legal Compliance

Challenge Unlimited, Inc. is knowledgeable about, and complies with, all applicable laws, rules and regulations.

#### V. Responsible Stewardship

Challenge Unlimited, Inc. manages its funds in a responsible and prudent manner.

The organization:

- Spends an appropriate percentage of its annual budget on programs in furtherance of its mission;

- Spends an adequate amount on administrative expenses to ensure effective accounting systems, internal controls and other expenditures critical to the management of the organization;
- Compensates staff, and any others who may receive compensation, reasonably and appropriately in light of the overall finances of the organization;
- Has reasonable fundraising costs (recognizing the internal and external factors that impact fundraising costs);
- Does not accumulate operating funds excessively;
- Only draws from endowment funds as may exist from time to time consistent with donor intent and to support the charitable purpose of the organization;
- Ensures that all spending practices and policies are reasonable and appropriate to fulfill the mission of the organization; and
- Ensures that all financial reports are accurate and complete in all material respects.

#### VI. Openness and Disclosure

Challenge Unlimited, Inc. provides comprehensive and timely information to the public and all interested persons and agencies, and responds in a timely manner to reasonable requests for information. Basic informational data about the organization, such as Form 990, reviews and compilations, and audited financial statements, are available to the public. All solicitation materials accurately represent the organization's policies and practices. All financial, organization and program reports are complete and accurate in all material respects.

#### VII. Program Evaluation

Challenge Unlimited, Inc. regularly reviews and assesses its various programs, and makes changes whenever warranted to better serve its constituents. The organization is committed to improving program and organizational effectiveness.

#### VIII. Fundraising

When raising funds from the public or donor institutions, Challenge Unlimited, Inc. is truthful in its solicitation materials. The organization respects the privacy concerns of individual donors and expends funds consistent with donor intent. The organization discloses relevant information to potential donors, and respects the rights of donors as follows:

- To be informed of the mission of the organization, the way resources will be used and the capacity to use donations effectively for their intended purposes;
- To be informed of the identity of those serving on the organization’s Board of Directors, if requested, and to expect the Board members to exercise prudent judgment in its stewardship responsibilities;
- To have access to the organization’s most recent financial reports;
- To be assured their gifts will be used for the stated purpose for which they are given;
- To receive appropriate acknowledgement and recognition;
- To be assured that information about their donations is handled with respect and confidentiality to the extent requested, or as provided by law;
- To expect that all communications with individuals representing the organization will be professional;
- To have the opportunity for their name to be deleted from the mailing lists that are maintained by the organization; and
- To feel free to ask questions when making a donation and to receive prompt and accurate responses.

### **Conflict of Interest Policy**

This policy is designed to protect the integrity of, and promote continued public trust and confidence in Challenge Unlimited, Inc. by ensuring that any actual, potential and/or perceived conflicts of interest, whether direct or indirect (collectively referred to as “conflict of interest”), are either avoided or are appropriately managed through prompt and full disclosure, recusal and/or other means.

The term “conflict of interest” refers to a situation where an employee, board member or other volunteer of the organization has a personal, professional or business interest that conflicts with, or may give the appearance of conflicting with, the best interest of the organization. Certain conflicts of interest may arise in nonprofit organizations and are not necessarily inappropriate. For example, an “acceptable” conflict of interest may arise if an employee or volunteer of the organization (or his/her relative, friend, business acquaintance, etc.) has an interest in, or relationship with, an entity that proposes to provide needed goods or services to the organization on terms and conditions that are more advantageous than the organization could obtain otherwise.

In any situation which may give rise to an actual, potential or perceived conflict of interest, including the example set forth above, all Challenge Unlimited, Inc. employees,

Board members and volunteers are required to promptly and fully disclose to the organization any such conflict of interest situation. Upon disclosure of the conflict of interest situation, the organization's Board of Directors shall review all relevant information and factors, and take appropriate action. The individual(s) that are involved in any respect with the conflict of interest situation may not thereafter attempt to influence the organization's decision, nor may they vote on whether to approve or disapprove the particular transaction. The individual(s) disclosure and abstention from voting shall be reflected in the minutes of the meeting at which the decision is made.

Under no circumstances shall any Challenge Unlimited, Inc. employee, Board member or volunteer: (a) accept any personal gifts, loans, favors or other consideration of more than a nominal value (i.e., \$25) from any vendor, sponsor or other outside party doing business with, or seeking to do business with, the organization; (b) use the organization's property or resources for personal profit or advantage, or for any purpose not related to the activities of the organization; and (3) use or disclose the name, likeness or identity of any person receiving services from the organization's various services without first obtaining the organization's express written permission.

If any Challenge Unlimited, Inc. employee, Board member or volunteer should have any questions concerning this Code of Ethics and Conflict of Interest Policy, please speak with the Executive Director or the Chairperson of the Board of Directors.

**ACKNOWLEDGEMENT OF RECEIPT  
OF CHALLENGE UNLIMITED, INC.  
CODE OF ETHICS AND  
CONFLICT OF INTEREST POLICY**

I, \_\_\_\_\_, acknowledge that I have read the Challenge Unlimited, Inc.'s Code of Ethics and Conflict of Interest Policy ("Policy") and agree to fully abide by all its terms, conditions and statements.

I acknowledge that I will promptly and fully disclose any situation which may give rise to an actual, potential or perceived conflict of interest in accordance with the Policy. In the event I am involved in any respect with an actual, potential or perceived conflict of interest situation, I will not thereafter attempt to influence the organization's decision regarding the conflict of interest. If I am a member of the organization's Board of Directors, I further understand that I will refrain from voting on any action arising from the conflict of interest.

I have received a copy of Challenge Unlimited, Inc.'s Code of Ethics and Conflict of Interest Policy.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

Dated: