

**Volunteers of The Institute of Actuaries of Australia (ABN 69 000 423 656) (Institute) must comply with the conditions set out below.**

**1. You are a volunteer**

- (a) As a volunteer, you perform all duties on a voluntary basis and you will not receive remuneration or payment for your work, other than reasonable reimbursement of expenses (see below at paragraph 6).
- (b) Neither the Institute nor you intend any employment nor contractor relationship to be created (that is, you are not an employee, independent contractor or consultant at the Institute). If this changes at any time, and there is a possibility that you might undertake paid work for the Institute, we will discuss this and document the arrangement in a formal employment contract, contract for services or other arrangement as relevant. Otherwise, you will remain a volunteer on the terms of this agreement.
- (c) You acknowledge and agree that you will not receive any payments for performing any work during your engagement as a volunteer.

**2. What you can expect when volunteering at the Institute?**

- (a) The Institute values its volunteers, and we will endeavour to provide you with:
  - (i) documents and/or instructions so you understand your role and the tasks you are authorised to perform];
  - (ii) a full induction, orientation and any training necessary for the volunteer role;
  - (iii) a safe environment in which to perform your role;
  - (iv) respect for your privacy, including keeping your private information confidential;
  - (v) a HQ contact, so that you have the opportunity to ask questions and get feedback (see paragraph 4 below);
  - (vi) reimbursement for your reasonable expenses so you are not out-of-pocket as a result of volunteering for us (for further information see paragraph 6 below); and
  - (vii) insurance to cover you for the volunteer duties you are authorised to perform (see paragraph 7 below).

**3. What does the Institute ask of its volunteers?**

- (a) During your engagement as a volunteer, you may be required to perform the duties and tasks as are conferred, delegated or specified by the Institute from time to time.
- (b) Further, we ask that you:
  - (i) support the Institute's aims and objectives;
  - (ii) participate in all relevant induction and training;

- (iii) only undertake duties you are authorised to perform and always operate under the direction and supervision of nominated staff and obey reasonable directions and instructions;
  - (iv) notify your Institute contact or another member of staff of any health and safety issues or potentially hazardous situations that may pose a risk to you or others and report any accidents or incidents relating to staff, volunteers, or the workplace;
  - (v) behave appropriately and courteously to all staff, members and other stakeholders of the Institute in the course of your role;
  - (vi) use any property or equipment given to you in your role safely and only for the purpose of the role and return it to the organisation when you finish your volunteer role;
  - (vii) let the Institute know if you wish to change the nature of your contribution (e.g. hours, role) at any time;
  - (viii) comply with the law at all times; and
  - (ix) be open and honest in your dealings with us and let us know if we can improve our volunteer program and the support that you receive.
- (c) Without limiting the matters set out above, you must be familiar with and observe the Institute's policies and procedures as varied from time to time. Nothing in the Institute's policies and procedures gives rise to a legal right or benefit enforceable by you.

#### **4. Contact person**

- (a) You will be introduced to your contact person prior to starting. Please note that this individual may change from time to time and you will be notified of this.
- (b) If you have any questions or concerns about your role, your health and safety, or if there is any assistance you need to help you undertake your role, please contact such person as soon as possible.

#### **5. Role description and details**

- (a) You will be required to perform tasks as per the advertised role.
- (b) If you are unsure whether a particular task or work is authorised, please do not hesitate to talk to your contact person (clause 4).

#### **6. Expenses**

- (a) As a volunteer, the Institute will provide you with reimbursement for any reasonable out-of-pocket expenses that you incur when performing authorised tasks associated with your role.
- (b) We do this to ensure that you are not financially disadvantaged as a result of your volunteer position with us. These payments are not remuneration or wages. You are required to obtain prior approval before incurring any expenses that you will seek reimbursement for and will need to produce receipts of purchases.

## 7. Insurance

- (a) The Institute has all necessary insurances in place for the operation of its business.
- (b) We are committed to providing adequate insurance cover for volunteers whilst carrying out their volunteering roles that have been approved and authorised by us.
- (c) You acknowledge that during your engagement you are not a “worker” and may not be entitled to make any claim under the Institute’s workers’ compensation insurance.
- (d) Otherwise, to ensure this insurance covers you for any incidents that occur while you are volunteering with us, you need to report an incident as soon as it has occurred.
- (e) We want to let you know that the following events are unlikely to be covered by our insurance:
  - (i) actions that are beyond the scope of your volunteer role, or that occur without appropriate authority or permission from us;
  - (ii) criminal activity (including criminal charges arising out of driving incidents); or
  - (iii) dishonest or reckless activities.

## 8. Confidentiality

- (a) In the course of your volunteer engagement, you may become privy to information that is confidential to the Institute, any related bodies corporate of the Institute, their directors, officers, employees, members, clients and/or suppliers, whether in written, computerised or oral form, which relates to its business, trade, affairs, donors, property or activities and which is generally not available to the public or known in the industry (**Confidential Information**).
- (b) You must not at any time during your volunteer engagement or after the cessation of your volunteer engagement for any reason:
  - (i) remove Confidential Information from the Institute’s premises unless authorised to do so by the Institute;
  - (ii) make copies of Confidential Information (except for the purposes of your volunteer engagement);
  - (iii) either directly or indirectly disclose any Confidential Information (unless expressly authorised by the Institute or required by law or court order or where the information has become public, otherwise than by breach of this clause 8); or
  - (iv) use or attempt to use Confidential Information for your own purposes, for any purpose other than that authorised by the Institute or in any manner that may injure or cause loss directly or indirectly to the Institute and/or its associates.
- (c) You must use your best endeavours to keep secure all Confidential Information that is in your possession or control. If you are uncertain as to whether information is Confidential Information, you must treat the information as Confidential Information unless advised by the Institute in writing to the contrary.
- (d) On receiving a request from the Institute at any time, you must immediately deliver to the Institute all Confidential Information including but not limited to any reports, plans, manuals, records, accounts, correspondence, copies and extracts of any papers or

other documents or property belonging to the Institute that is in your custody, control or possession or the control, custody, or possession of any person to whom you have disclosed Confidential Information (whether or not disclosure to that person was with the consent of the Institute). You must not use (or allow to be used) or retain Confidential Information in any form or use (or allow to be used) any ideas contained in the Confidential Information.

- (e) If requested by the Institute at any time during or after your volunteer engagement, you must immediately return to the Institute property belonging to the Institute that is in your possession or control.
- (f) Both during the course of your volunteer engagement with the Institute or after termination, for whatever reasons, you shall not do anything to harm or prejudice the reputation or good name of the Institute or its partners or associates or its employees, or do anything in relation to employees or donors of the Institute or its subsidiaries or associates which may be adverse or prejudicial to, or inconsistent with, the policies or management of the Institute.

## **9. Intellectual Property**

- (a) All volunteers at the Institute agree to transfer all intellectual property rights and interests (including copyright) in any ideas or materials they create relating to their provision of voluntary services at the Institute to the Institute.
- (b) Also volunteers are taken to consent to the use by the Institute of such creations in a manner reasonably contemplated by the voluntary services provided under this document. As a volunteer you also agree not to bring any claim for infringement of your moral rights in respect of that use.

## **10. Termination**

- (a) You agree that your engagement as a volunteer may be terminated by the Institute in its absolute discretion at any time and for any reason prior to the end of your engagement.
- (b) You may also choose to end your engagement as a volunteer at any time.