

Sample template from Safe Hotline. Not legal advice; have your attorney review this policy before you adopt it. Replace or delete every [bracketed] item. Last updated October 2026.

[Organization Name] Whistleblower Policy

Effective date: [Date adopted]

Approved by: [Board of Directors / Owner]

Policy contact: [Name and title of designated officer]

1. Purpose

[Organization Name] is committed to honest, ethical and lawful conduct. This policy encourages employees and others to report suspected wrongdoing in good faith, explains how to report it, and protects people who report from retaliation.

2. Who this policy covers

This policy applies to all employees, [volunteers], [members of the Board of Directors], [contractors, vendors and consultants], and anyone else who works with or on behalf of [Organization Name].

3. What to report

Report any conduct you believe in good faith is illegal, unethical or a violation of [Organization Name] policies. Examples include:

- Financial misconduct, such as questionable accounting, falsified records or misuse of funds
- Theft, embezzlement or misuse of [Organization Name] property
- Harassment or discrimination
- Health and safety risks
- Undisclosed conflicts of interest
- Violations of [Organization Name] policies, including our [Code of Conduct]
- Retaliation against anyone who reported a concern

4. How to report

You may report a concern in any of these ways:

- To your supervisor, or to [Name or title of designated officer] at [email address or phone number].
- If the concern involves your supervisor or senior leadership, to [Board Chair / Audit Committee Chair] at [contact information].

- Anonymously, through our independent third-party ethics hotline, available 24 hours a day, 7 days a week:
 - Web: [Hotline web address]
 - Toll-free phone: [Hotline phone number]
 - Text: [Hotline text number]
 - Company ID: [XXXX]

You do not have to give your name. Anonymous reporters receive a [Report Key / reference number] they can use to check the status of their report and answer follow-up questions. Please include as much detail as you can: what happened, when and where, and who was involved.

5. Confidentiality and anonymity

Reports will be kept confidential to the extent possible, consistent with the need to review the concern properly and with any legal obligations. Information will be shared only with people who need it to review or resolve the concern. If you report anonymously, [Organization Name] will not try to identify you.

6. No retaliation

[Organization Name] will not retaliate against anyone who reports a concern in good faith or who takes part in a review or investigation. Retaliation includes firing, demotion, suspension, threats, harassment or any other adverse action taken because of a report. Anyone who retaliates will face discipline, up to and including [termination of employment / removal from their role]. If you believe you have experienced retaliation, report it using any of the channels above.

7. Good-faith reporting

Report concerns you honestly believe to be true. You do not need proof, and you will not be disciplined if a good-faith concern turns out to be mistaken. Knowingly making a false report is a serious matter and may lead to discipline.

8. How reports are handled

- [Designated officer] will acknowledge each report within [5 business days] when the reporter can be reached, including anonymous reporters through the hotline.
- Each report will be reviewed promptly and, where appropriate, investigated by [Designated officer / investigator].
- Concerns involving [the Executive Director / CEO / Owner], other senior leaders or financial reporting will go to [the Board Chair / Audit Committee Chair], who will oversee the review.
- No one will review or investigate a report that involves them.
- Where possible, the reporter will be told when the review is complete. [Organization Name] will take appropriate corrective action when a concern is substantiated.
- [Designated officer] will give [the Board / Audit Committee] a summary of reports and their outcomes at least [annually / quarterly].

9. Recordkeeping

[Designated officer] will keep a record of each report, the review and the outcome. Records will be stored securely, with access limited to the people who need it, and kept for [retention period] in line with [Organization Name]'s record retention policy.

10. Policy review and acknowledgment

[Board of Directors / Owner] will review this policy at least [once a year]. [Organization Name] will share this policy with everyone it covers and post its hotline information where people can see it.

Adopted by [Board of Directors / Owner] on [Date]. Last reviewed: [Date].

Acknowledgment: I have read and understand the [Organization Name] Whistleblower Policy.

Name: _____

Signature: _____

Date: _____