



# PERSONNEL HANDBOOK

# GREAT RIVERS UNITED WAY

Effective January 1, 2024

(changes made and approved November 10, 2023 by the HR committee, approved by BOD on November 17, 2023)



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# PERSONNEL HANDBOOK

## Great Rivers United Way

### Section 1: Overview and Equal Employment Opportunity

Welcome! Great Rivers United Way (GRUW) strives to be an employer of choice in the area and we hope you enjoy your time working here. GRUW appreciates your dedication to the mission and values of collaboration, integrity, advocacy and equity. We strive to be a workplace that embodies those values internally as well as in our community work.

It is the intention of GRUW to treat every employee with respect and to promote an atmosphere that fosters a balance of trust and accountability, empowerment and clear communication. The information contained herein applies to all persons employed by GRUW.

#### ***About this Handbook***

This handbook, which is effective January 1, 2024, which supersedes any previous GRUW Handbook, is meant to be an informative guide to the principles, policies, procedures, programs and benefits of GRUW. It is not a contract of employment or condition of employment. Employees are encouraged to familiarize themselves with the contents of this handbook, for it will answer many common questions concerning employment with GRUW.

Information contained in this handbook is presented in summary form for informational purposes only. This handbook cannot anticipate every situation or answer every question about employment, and it is not intended to create contractual obligations of any kind.

To retain necessary flexibility in the administration of policies and procedures, GRUW may find the need to change, revise, or eliminate any of the policies and/or benefits described in this handbook. Good communication will ensure that employees are made aware of any sudden revisions.

#### ***Nature of Employment***

Although we hope all employees can stay with GRUW for a period that mutually benefits them and the organization, employment with GRUW is on an "at will" basis. This means that the employment relationship may end at the choice of either party, with or without notice, and with or without cause, at any time. This "at will" relationship shall remain in effect throughout your employment at GRUW.

No person other than the Chair of the Board of Directors has the authority to make any agreement for employment for any specified period of time or to make any agreement contrary to the "at will" employment relationship. Any such agreement must be in writing and signed by the Chair of the Board of Directors.

## ***Equal Employment Opportunity***

GRUW is an equal opportunity employer providing equal opportunities to all employees and applicants. We are committed to a work environment that supports, inspires, and respects all individuals and in which personnel processes are merit-based and applied without discrimination based on race, color, religion, gender, sexual orientation, gender identity, citizenship or immigration status, marital status, age, disability, national or ethnic origin, military service status or other protected characteristic.

## ***Open Door Policy***

We value input and insights from our employees so we can continue to grow. GRUW is committed to an Open-Door Policy. Employees with questions or concerns about inappropriate workplace conduct, or their status or conditions of employment, should bring these issues to the attention of the Executive Director or, if uncomfortable raising the matter with the Executive Director, to the Chair of the Board of Directors. Employees can raise concerns and make reports without fear of reprisal.

## ***Inclusive Language Policy***

GRUW strives to promote inclusivity and the valuing of diversity through inclusive language in the workplace and in our dealings with our communities. For example, we aspire to use “person-first” language, gender neutrality, respect of people’s personal pronouns and how they like to be identified.

## ***Anti-Harassment Policy***

Consistent with its Equal Employment Opportunity policy, GRUW seeks to provide a work environment that is free from intimidation, harassment, or offensive behavior based on race, color, creed, religion, gender, age, national origin or ancestry, marital status, physical or mental disability, sexual orientation, gender identity, veteran status or any other protected status under law. Intimidation, harassment, or offensive behavior may arise from a broad range of physical or verbal behavior.

Examples may include, but are not limited to, the following:

- Physical or mental abuse
- Unwelcome sexual advances or touching
- Sexual comments, jokes, stories or innuendos
- Racial, ethnic or religious insults or slurs
- Requests for sexual favors used as a condition of employment or affecting any personnel decision such as hiring, promotion, compensation or termination
- Display of sexually explicit or otherwise offensive posters, calendars or materials
- Insults, slurs, or jokes about a person’s mental or physical condition or disability
- Making sexual gestures with hands or body movements
- Intentionally standing close or brushing up against another employee
- Racial, ethnic or religious jokes, comments, stories or innuendo
- Inappropriately staring at another employee or touching their clothing, hair or body

- Whistling at another employee, cat calls
- Display or distribution of racially, ethnically or religiously offensive materials
- Asking personal questions about another employee's sexual life
- Repeatedly asking for a date with an employee who has stated they are not interested
- Retaliation against an individual for reporting harassment in the workplace or participating in an investigation of a harassment complaint

These activities are offensive and are inappropriate in the workplace. This policy against harassment applies throughout our work environment, whether on GRUW's premises, at work assignments outside the practice's premises, or at practice-sponsored social functions or otherwise.

It is every employee's responsibility to ensure that such prohibited conduct or activities do not occur. Accordingly, if any employee believes that he or she has been the subject of prohibited discrimination, harassment, or retaliation, or if an employee has observed such behavior in the workplace, the employee must report the matter immediately to the Executive Director. If the employee is uncomfortable raising the matter with the Executive Director, the employee should immediately report the matter to the Chair of the Board of Directors.

GRUW will promptly investigate any such report and will keep the matters as confidential as possible, except to the extent necessary and to pursue the investigation and to take corrective action. GRUW will take appropriate remedial action to enforce its strict prohibition of unlawful harassment, discrimination, or retaliation in the workplace.

### ***Workplace Violence Policy***

GRUW is strongly committed to providing a safe workplace. Threats, threatening language, or any other acts of aggression or violence made toward or by any employee will not be tolerated. For purposes of this policy, a threat includes any verbal or physical harassment or abuse, any attempt at intimidating or instilling fear in others, menacing gestures, flashing weapons, stalking, or any other hostile, aggressive, injurious, or destructive action undertaken for the purpose of domination or intimidation. Employees and visitors are prohibited from carrying weapons onto GRUW premises. All potentially dangerous situations, including threats by co-workers, should be reported immediately to the Executive Director.

<h2><b>Section 2: Work Policies</b></h2>
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### ***Working Schedules***

GRUW office hours are generally between 8:00 am to 4:30 pm Monday through Friday. Full-time employees are eligible to receive an unpaid half-hour for lunch. The work week is defined as Sunday through Saturday. Flexible work schedules are accepted as long as good communication with the Executive Director is practiced regarding that schedule.

Work schedules for employees vary throughout the organization and may be changed at any time at the Executive Director or direct supervisor's sole discretion. Staffing needs may necessitate variations to starting and ending times, as well as variations in the total hours that may be scheduled each day and week.

### ***Remote Work Policy***

GRUW is proud to support the work-life balance needs of its employees through our remote work policy, which is available in certain negotiated situations. Working remotely is accomplished through an agreement with the employee and their supervisor and should not be considered permanent or guaranteed. At a new employee's 90-day evaluation, an employee becomes eligible for this opportunity but at the discretion of the evaluating supervisor. The Remote policy is not designed to be a substitution for appropriate childcare nor to be used in replacement of normal team interaction at GRUW.

The remote work policy will allow for a maximum of two (2) full days per week to work away from the office. No remote working will be approved for Wednesday unless there are extenuating circumstances and approved by a direct supervisor. This is the opportunity for staff to be together in one place, meeting every week and providing the face-to-face environment that strengthens the organization. GRUW values the employee contributions whether working remotely or in person.

If your remote days will change week to week (and they might, depending on your meeting schedules) please try to communicate the days by Friday morning for following week to your Direct Supervisor so appropriate communication can be made. Please use your shared Outlook Calendar to indicate whether you are working remotely for better communication with the whole GRUW team.

Because working remotely is not a mandatory policy, GRUW technology equipment (excluding a GRUW laptop) will not be toted back and forth to the office between remote days and office days. All technology needed for an employee's comfort and ease of working at home will be the employee's responsibility, as this is not a mandatory situation, but one chosen by the employee.

Core hours of remote working is to be between 9:00 am and 3:00 pm Monday through Friday to ensure appropriate responsivity to both co-workers and colleagues in the community. As often as possible, the two (2) remote days must be determined ahead of time and communicated to the direct supervisor for each week. There are positions at GRUW that require "in the community" participation. Working one or two hours at home before or after a meeting in the community can be more efficient, depending on the location of that meeting. Those times are **not** considered in the two (2) full days of remote working that is allowed in this policy – those times will occur now and then and need to be communicated to your team, so they are aware.

### ***Virtual Meetings***



When participating in a virtual meeting, please be mindful of dressing appropriately and your screen background. Please use branded backgrounds or blur your background so that what happens behind you in a virtual meeting is not a distraction to others.

### ***Paydays***

Employees are scheduled to be paid semi-monthly on the 15<sup>th</sup> and last day of each month. Each paycheck will include earnings for all work performed through the end of the previous payroll period. When payday falls on a Saturday or Sunday, employees are paid on Friday.

Paychecks include a statement detailing earnings and deductions. Employees may ask for certain approved amounts to be deducted from their pay such as GRUW campaign contributions, 403(b) retirement plan (tax deferred annuity) or flex spending plan. The Finance & HR Director supplies employees with the compensation information needed to file federal and state income tax reports.

### ***Non-Exempt Employees***

For those employees working on an hourly wage arrangement, regular working hours will be scheduled by the Executive Director. Additional hours may be required as deemed necessary. Accurately recording time worked is the responsibility of every nonexempt employee. Employee time records must note all types of leave and allocate time spent on specific projects. Employees must complete a time sheet daily and submit to the Financial Director prior to the 15<sup>th</sup> and last day of each month. Payroll is based on the time records submitted.

When projects cannot be completed during regular working hours, employees may be scheduled to work overtime hours. When possible, advance notification of these mandatory assignments will be provided. All overtime work must receive the supervisor's prior authorization.

Overtime compensation is paid to all nonexempt employees in accordance with federal and state wage and hour laws and regulations. Overtime pay is based on each employee's pay and actual hours worked in a workweek. Time off for sick leave, vacation leave, leaves of absence or any other permissible exception will not be considered hours worked for purposes of performing overtime calculations.

### ***Exempt Employees***

For employees who are salaried, regular working hours will be determined by the Executive Director. As a result of their job responsibilities, however, exempt employees may experience variable schedules from day-to-day and week-to-week. If an exempt employee's schedule falls outside of GRUW's regular work hours on more than an occasional basis, and such a change has been approved by the Executive Director, it will be communicated to other employees.

Exempt employees are exempt from minimum wage and overtime pay eligibility under state and federal wage and hour laws. They are expected to manage their time in such a way that job duties, goals and objectives, and work plans are accomplished.

### ***Attendance and Punctuality***

To maintain a safe and productive work environment, GRUW expects employees to be reliable and punctual in reporting for scheduled work to avoid putting a burden on other employees and on GRUW. In the rare instances when employees cannot avoid being late to work or are unable to work as scheduled, they should notify their supervisor or Executive Director as soon as possible in advance of the anticipated change of schedule.

### ***Severe Weather Policy***

If GRUW does not close but employees choose to leave work early because of severe weather, nonexempt employees will be given the option of either making up hours within the same work week or working remotely with approval. Exempt employees who choose to leave early due to inclement weather must still see that their required work is completed in a timely manner. Employees who are unable to report to work for the entire day due to inclement weather may work remotely or take a personal floating day or vacation day. If working remotely is chosen by the employee, the remote policy parameters take effect regarding core hours and counts toward the maximum of two (2) days in a week.

### ***Career Opportunities***

GRUW wishes to encourage and support career development within the organization and will consider transfer requests. To be considered for an open position, employees must be in good standing and must have worked in their current position for six months, must meet the minimum eligibility requirements for the job and be able to perform the essential functions of the job with or without reasonable accommodation. All hiring, transfer or promotion decisions are based on GRUW's determination of who is the most qualified applicant to perform the job.

### ***Solicitation Policy***

To prevent disruptions, interference with work and inconvenience to other employees, solicitation for any cause, or distribution of literature of any kind, during working time (defined as that time when the soliciting or solicited employee should be working, and not including scheduled break time, mealtime or other times when an employee is off duty), is not permitted. Neither may an employee who is not on working time solicit an employee who is on working time for any cause or distribute literature of any kind to that person. Whether on working time or not, no employee may distribute literature of any kind in work areas. Persons not employed by GRUW may not solicit for any purpose or engage in distribution of literature of any kind on GRUW's premises at any time.

Exceptions to this policy must be approved in advance by the Executive Director.

### ***Drug and Alcohol Policy***

GRUW is committed to providing a drug-free workplace. GRUW prohibits the sale, use, possession, transfer, distribution or manufacture of alcohol or any illegal drug while performing job duties or on the practice's property, irrespective of whether the employee is on or off duty. Any employee who reports to work under the influence of alcohol, or

under the influence or in possession of illegal drugs or unauthorized prescription drugs, will be subject to discipline, up to and including termination. GRUW does not have a testing policy, but if there are frequent concerns shared from other employees and community partners, there may be a need for testing to determine what kind of help and employee might need.

There may be occasions when it is permissible to consume a limited amount of alcohol on GRUW property or during work time. Such occasions may include GRUW social or business functions, after business hours at professional events or professional association meetings, or while traveling on business or marketing/entertaining donors or potential donors, provided such consumption is consistent with the nature of the event and otherwise socially acceptable and appropriate under the circumstances. It is nevertheless a violation of this Policy for an employee to consume an excessive amount of alcohol on GRUW property or during work time (i.e., to consume an amount sufficient to cause the person to be impaired in his/her ability to drive or responsibly interact with others). Further, no one should ever drive under such circumstances, but instead take a taxi, stay at a hotel or otherwise avoid driving while impaired. Our public image is directly dependent upon our staff, individually and collectively. People are inclined to judge organizations by the people who represent them.

### ***Smoke-Free Workplace***

GRUW is committed to providing a safe and healthy environment for all employees and visitors. As a result, smoking is not permitted in the GRUW building or within 25 feet of any outside door of the building.

### ***Confidentiality***

As members of the GRUW staff, employees will have access to confidential information about the organization, its Partners and its contributors. This knowledge imposes an important responsibility to treat this information as strictly confidential. Employees may not disclose such information to others, unless required as a part of their job responsibilities, or unless first receiving permission of the Executive Director.

### ***Code of Ethics Guide***

GRUW staff and Board members receive and sign the Code of Ethics Guide annually. This Code of Ethics is based on our mission and is guided by our values of collaboration, integrity, advocacy and equity.

### ***Privacy Policy***

GRUW reserves the right to inspect all of its property, without notice, including but not limited to desks or information within its computer or telephone systems, including e-mail, voicemail or other communications created or maintained in electronic form.

### ***Electronic Communications Policy (Email and Internet)***

GRUW's electronic communication system is the organization's property. All messages, information, and data sent and received by the electronic communication system are company property. Employees have access to the company's electronic communication system to enhance job performance on day-to-day assignments and to

facilitate effective business communications. Incidental and occasional personal use of the electronic communication system is allowed, but such use will be subject to this policy and any resulting messages and data are the property of the Agency. Examples of incidental or occasional personal use are used during breaks, lunch, or use for no more than a few minutes a day during working hours. This personal use is allowed when it does not interfere with an employee's work performance, interfere with any other employee's work performance, unduly impact the operation of the electronic communication system, or violate any other provision of this or any other GRUW policy.

Employees may not use the electronic communication system in any way inconsistent with their responsibilities or with the policies in this handbook. An employee may not copy, download, or use any image, text, video, audio material, software, or other copyright-protected or trademark-protected data without appropriate authorization.

### ***Portable Electronic Device Usage***

Employees may have access to a cell phone while in their cars and should remember that their primary responsibility is driving safely and obeying the rules of the road. Employees are prohibited from using cell phones to conduct business while driving and should safely pull off the road and come to a complete stop before dialing or talking on the phone. Use cell phones for personal use appropriately for a professional work environment and at a minimum. Be cautious when checking texts or emails when in a meeting representing GRUW.

### **Dress Code**

GRUW counts on employees to project a positive image of the organization with professional attire in the workplace, during virtual calls and while representing the organization in the community. GRUW also respects individuality and cultural diversity in the workplace that includes dress, hairstyles, jewelry, etc.

### ***Return of Property***

Employees are responsible for all GRUW property, materials or written information issued to them or in their possessions or control. Employees must return all GRUW property immediately upon request or upon termination of employment.

## **Section 3: Employee Review and Potential Discipline**

### ***Employee Conduct and Work Rules***

GRUW expects business-like, professional personal conduct from all employees. No written list of rules can be complete, nor can it substitute for good judgment. The following are examples of conduct that may result in disciplinary action, up to and including immediate suspension or termination of employment. This list is not meant to be all-inclusive:

- Theft or inappropriate removal or possession of property
- Any act of dishonesty or failure to be forthright in any matters relating to

- employment.
- Falsification of company records
  - Working under the influence of alcohol, illegal drugs or unauthorized prescription drugs
  - Possession, distribution, sale, transfer, or use of alcohol or illegal drugs in the workplace, while on duty, or while operating employer-owned vehicles or equipment
  - Fighting or threatening violence in the workplace
  - Boisterous or disruptive activity in the workplace
  - Negligence or misuse of company property
  - Disrespectful conduct
  - Using profane, obscene, abusive, or otherwise inappropriate language while at work
  - Violating the policies in this handbook
  - Smoking in prohibited areas
  - Sexual or other unlawful or unwelcome harassment
  - Possession of dangerous or unauthorized materials, such as explosives or firearms, in the workplace
  - Poor attendance, excessive absenteeism, or any absence without notice
  - Unauthorized absence from work during the workday
  - Unauthorized use of telephones, mail system, or other employer-owned equipment
  - Unauthorized disclosure of business "secrets" or confidential information
  - Unsatisfactory performance or conduct

### ***Periodic Evaluations***

GRUW is committed to the growth and professional development of all its employees. Feedback is designed to be constructive and strengths based. GRUW endeavors to provide regular feedback to each employee concerning his or her work and overall work performance. This is provided both formally and informally and includes regular interactions with your supervisor as well as through the written evaluation process.

GRUW will provide a new employee with an initial evaluation following the first 90 days of employment. GRUW will also endeavor to provide each employee with regular check-ins and timely input/evaluation throughout the year. Annually Direct Supervisors will provide a summation evaluation to appropriate employees with stated goals for the year that both supervisor and employee agree upon, and the Chair of the GRUW Board of Directors, along with the HR Committee Chair, will provide the evaluation to the Executive Director.

As with all communication concerning your job, GRUW's formal and informal feedback is designed to help both you and the organization work in a way that provides the best possible service in meeting the agency's goals. In the event any work performance deficiencies raised in this process GRUW will first attempt to work with the employee on a performance plan. If identified issues are not addressed to GRUW's satisfaction, further action may be appropriate, including a formal performance improvement plan, discipline or employment separation.

## Section 4: Business Expense and Travel Policy

### ***Travel Overview***

All employees are expected to utilize the least expensive, reasonable method of transportation and the most direct route when traveling for GRUW business. Appropriate documentation for all expenses must be submitted to the Finance Director to be reviewed for reimbursement.

Conference Travel must be preapproved of by the Executive Director. Application for GRUW business expense reimbursement will be made in the monthly expense report submitted to the Finance Director.

1. *Automobile transportation:*
  - a. GRUW business mileage, for both in and out of city for work activities, will be reimbursed at the lowest of a) mileage at the rate GRUW has established, which is generally consistent with the IRS federal rate per mile; or b) rental car; or c) coach/economy airfare.
  - b. GRUW will not reimburse for travel between an employee's home and primary work site.
  - c. Employees will be notified of rate changes in guidelines as they occur.
2. *Parking:* Parking fees will be reimbursed with the provision of receipt. Tickets resulting from personal decisions will not be reimbursed.
3. *Meals:* Reimbursement for meals will be made if the employee is actively conducting GRUW business during the meal or if the employee has an approved overnight stay.
  - a. A per diem of \$50 per day for meals is reimbursable, when receipts are submitted, over that amount must be pre-approved by the Executive Director.
  - b. Tips should not exceed 20% gratuity.
  - c. Itemized receipts should identify the location, date, amounts and the reason for the meeting, and alcoholic beverages will not be reimbursed.
  - d. Alternative meals are not reimbursed if the conference provides meals that are charged for as part of the conference agenda. If a special meeting is held with fellow conferees (Metro 2-4, women's initiative, etc.) meal expense will be reimbursed.
4. *Overnight Accommodations* will be reimbursed if the employee is conducting business substantially beyond normal business hours or if employee is far enough away from home to reasonably prohibit return before 11:00 pm. Where accommodation is provided as part of a conference, GRUW will reimburse the actual cost incurred based upon appropriate documentation.

### ***Other Business Expenses***

*Cell Phones:* GRUW reimburses eligible employees, determined by the Executive Director, up to \$50 per month for a cell phone or other portable electronic device to be used as a business tool. Such devices are to assist employees in communicating with management and other employees, donors, associates, and others with whom they may conduct business. A copy of your monthly cell phone expense should be attached to

your expense report that goes to the Finance Director to be reimbursed for this business expense.

Corporate Credit Cards: Use of corporate credit card for personal charges is not allowed. Should a personal expense be unavoidably incurred, notice must be given to the Finance Director and the entire personal balance is due and payable upon receipt of the bill. GRUW will not defer or extend payment on behalf of an employee. Any amount not paid will be withheld from the next expense or salary check, whichever occurs first. Credit card receipts are requested monthly, at a minimum.

Reimbursement Approvals: Purchase of meals or refreshments for volunteer meetings by a staff member are only allowed with prior approval from the direct supervisor or Executive Director. As a rule, refreshments for volunteer/committee meetings should be limited to special occasions that involve volunteer/employee recognition, thank you or meetings that mark the beginning or end of a major work effort.

Cards/Flowers/Gifts:

On special occasions it is sometimes appropriate, with Executive Director or Finance Director's approval to provide business gifts. The item should be appropriate for the situation, in the best public interest of the organization and in keeping with the spirit of the GRUW role as a charitable organization. Generally accepted recipients of gifts include volunteers, outgoing board/committee chairs, major donors, pro-bono speakers, and retiring staff. Additionally, recognition of certain events that impact GRUW staff, such as deaths, is appropriate. Cost of gifts should not exceed the \$30.00 to \$45.00 range.

<b>Section 5: Leave Away from Office</b>
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**Holidays**

Great Rivers United Way will be closed on the following Federally acknowledged holidays:

- New Year's Day
- Martin Luther King Jr. Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Thanksgiving Day
- Christmas Day

For holidays that fall on a Saturday, the office will close on the previous Friday. For holidays that fall on a Sunday, the office will close on the following Monday.

Full-time employees who work 40 hours a week will receive full pay for holidays. Part-time employees who work less than 40 hours per week will receive payment for hours

normally worked on that holiday. Temporary employees are not eligible to receive holiday pay.

### ***Floating Personal Days***

Full-time employees receive five additional floating personal days for the year. Part-time employees will be determined on a pro-rata basis for the hours normally worked each week. These days are selected with the prior approval of your Direct Supervisor. These personal days cannot be carried over from year-to-year and are not paid upon separation from GRUW. The floating days may not be taken after notice of intent to resign has been given. New employees will be eligible for personal days following 90 days of employment.

Great Rivers United Way's core work is supported by an annual fundraising campaign called the Community Investment Campaign. As an incentive to give, there is an opportunity to gain an extra personal day in a calendar year by pledging or contributing to the Community Investment Campaign at the Leadership level (\$500 or more annually) OR by increasing your donation over the previous year by 3%.

### ***Vacation***

The vacation calendar begins on January 1. If a holiday occurs within the vacation period, that day is not counted as a day of vacation. Vacation is earned for each full calendar month of employment. There is no vacation earned for a partial month worked. Vacation is earned as long as you are actively employed and working. An employee may use vacation days prior to accruing them, however if days used are more than what is accrued when an employee leaves GRUW an adjustment will be made on the last paycheck.

Full-time employee vacations are granted as follows:

First year of employment	10 days
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An additional day of vacation is received after each employment anniversary date. (For example: after completion of the first year of employment 11 days will be available; after completion of the second year of employment 12 days will be available after ten years of employment 20 days will be available)

A maximum of 25 vacation days will be granted after fifteen years of employment.

Part-time employees are eligible for vacation in proportion to the number of hours worked per week. The number of hours paid will be based on a lookback period of the previous year. New employee hours paid will be based on the number of hours expected to work each day until a lookback period is available.

Vacation is accrued monthly and is pro-rated for new employees; vacation can be used the first of the month following 30 days of employment. Accrual rate is dependent on the number of years at GRUW, increasing each year of employment. Rates can be found on the Shared Folder at staff/ forms/ vacation and sick/ annual accrual tables.



If an employee leaves GRUW, they will be paid for any unused vacation time accrued through their last day of work and any days used over the amount accrued will be deducted from the final paycheck. Vacation leave may not be taken after notice of resignation has been given.

### ***Carry-Over Vacation***

Carry-over vacation is defined as accrued vacation time not used by the end of the calendar year or December 31. Carry-over days must be used within six months of an employee's anniversary date. For example, if your anniversary date is June 16<sup>th</sup>, you must use all vacation days carried over by December 15<sup>th</sup>.

### ***Sick Leave***

GRUW provides the opportunity for paid sick leave to its employees for absences attributable to the employee's own illness, or to allow for an employee to care for a spouse, domestic partner or child who is ill. Remote working can be used on a case-by-case basis with approval from your Direct Supervisor. An employee can work at home if they are feeling under the weather, but still able to work, as agreed upon with your Supervisor. It allows for germs to not be spread at the office or to be at home caring for sick parties, keeping in mind that your main attention should be given to a sick child, not working remotely. If you use your remote working days in this way, the remote working policies are in play as outlined elsewhere. The accrual schedule for sick leave is as follows:

Full-time employees may accrue 10 paid sick days per year.

Part-time employees may accrue prorated hours based on the number of hours worked per week in a look-back period of the previous year, not to exceed 10 days per year.

Temporary employees are not eligible for paid sick days.

Sick time can be used for medical appointments, but do not need to be used if time away from work is less than 1-2 hours and can be made up within the week or even that same day.

Accrued but unused sick days may be carried over from year to year, to a maximum of 130 workdays. Sick leave may not be taken more than the hours accumulated, nor may it be used after notice of resignation is given. Employees will not accrue sick leave when on an approved leave of absence, including for medical reasons. All unused sick days are forfeited at termination of employment.

Employees who have exhausted their sick leave, but require additional leave, may request an unpaid leave of absence from the Executive Director.

Employees who need to be absent for any reason, including illness, should inform their Direct Supervisor as soon as possible. In the event an employee is absent due to illness, their Direct Supervisor may require a doctor's certificate if the illness lasts more than three (3) days. Direct Supervisors can be flexible if unforeseen circumstances arise. Please ask if you are being stressed by illness for yourself or your family.

## **Leave of Absence**

Leaves of absence may be granted for pressing and unique personal reasons—such as the birth or adoption of a child, to care for your own serious physical or mental health condition, or to care for a parent, domestic partner, spouse, or child with a serious physical or mental health condition—or for other compelling reasons. A leave of absence request can be up to 12 weeks or 60 days. A request for a leave of absence needs to be in writing and outline the reason(s) for the requested leave, the planned duration of absence and the specified time involved. Please make a request to the Executive Director no less than 30 days in advance, if possible. If the leave is due to your own medical condition, please provide a medical release before you return to work. The eligibility of this leave policy requires a GRUW employee be on staff for at least 12 months.

**Except as specifically noted below**, any leave of absence approved by the Executive Director (the Executive Director's requests for leave must be submitted to the Chair of the Board of Directors) will be unpaid unless using accrued Vacation, accrued Sick or floating personal days. For up to 60 working days of such approved unpaid leave, however, GRUW will pay for the employer portion of the employee's health and disability insurance, and the employee will be responsible for the employee portion of those premiums. Vacation and sick leave do not accrue while an employee is not working while on a leave of absence.

Exceptions include the following:

1. **Parental Leave** - Six weeks of agency paid leave for a birth or adoption; may request additional time, up to a total of 12 weeks paid using accrued vacation, accrued sick time, or floating personal days. All paid leave must be exhausted, except for 10 days, before an employee can go to an unpaid situation. Any combination of the previous can be used but needs to be communicated and approved ahead of time. The 12 weeks must be taken at the start of the birth/adoption and taken in sequential weeks. The employee may start their leave before the event, but the 12-week leave would start at that agreed upon time.
2. **Professional Leave**. Employees may request unpaid leave for professional study.
3. **Jury Duty**: GRUW will allow employees to be excused from work to serve jury duty. For up to two weeks of jury duty per year, employees will be paid the difference between those hours scheduled but not worked and the amount received for jury duty upon receipt of proof of jury service and the amount received for jury duty.
4. **Bereavement and Funeral Leave**: Paid funeral leave is available when a death occurs in an employee's immediate family and causes the employee to miss regularly scheduled work for bereavement or other purposes related to the death. A maximum of five (5) days bereavement leave with pay will be granted when a spouse, domestic partner, parent of employee, parent of spouse or

domestic partner, or child dies. A maximum of three (3) days bereavement leave with pay will be granted when other family dies, such as siblings (siblings in-law) or grandparents of employee, spouse or domestic partner. One day off with pay is provided for death of a loved one not otherwise mentioned above. Additional time can be taken, paid by using accrued vacation or floating personal days.

5. ***Military Leave:*** An employee who serves as part of an Armed Forces Reserve or National Guard will be granted unpaid leave for any necessary training, tests, or emergencies and re-employment in accordance with federal and state laws and regulations.

## **Section 5: GRUW Extras**

### **Volunteer Time Off (VTO)**

Great Rivers United Way believes strongly in volunteering. It is a tenant of the agency's values. A VTO program exists to encourage employees to volunteer in their communities while getting paid. Each month, four (4) hours of VTO is allowed per employee. These hours can be taken in any form that works for the employee and the volunteer activity. Approval from the direct supervisor needs to occur with at least a week's warning and being cognizant of work schedules, meetings and commitments. A VTO form will need to be filled out stating the location of the volunteer activity and what activity will be done. This documentation will be a good way to track how much time employees are volunteering and what types of work is being done, which may inspire other staff to further contribute to GRUW's mission.

### **Lactation Accommodation**

GRUW recognizes that nursing infants is an excellent method of providing infants with a healthy start on their development.

- To facilitate the expression of milk, GRUW will take appropriate measures to provide a closed-door space for nursing mothers.
- Employees should use their usual break and meal periods for expressing milk, when possible.
- GRUW will provide a refrigerator on the premises for keeping expressed milk safe. Employees must provide their own containers and clearly mark them with their name and date.
- Employees who wish to express milk during the work period will communicate with their supervisor their needs so that appropriate accommodation can be provided. Employees will not be discharged or in any other manner discriminated against in exercising their rights as a breastfeeding mother.

### **Special Visitors at Work**

GRUW understands that periodically an employee might need to bring a child or pet to the office for a variety of reasons. We welcome the visitors and will likely hold babies, pet animals, and generally accept your family with open arms. While they are welcome, we would request that while they are here, they spend most of the time in your workspace and aren't left to roam around the office. Nonmobile infants can spend a

limited time in an employee's workspace periodically if there is no disruption to the workflow of the office.

## **Section 6: Insurance and Other Benefits**

All benefits are reviewed annually and approved by the Human Resources Committee. The actual coverage described in the summary plan description will prevail if there is a conflict in terms.

### ***Group Life & Long-term Disability Insurance***

Accidental death and dismemberment, life insurance, and long-term disability insurance benefits are provided. For details on coverage and benefits, see the booklet available from the Finance Director.

**Eligibility:** employees who regularly work a minimum of 20 hours a week are eligible for these plans. Coverage starts on the first day of the month after one year of service is completed, provided that the employee is actively at work on that date. For example, if an employee is hired January 12, 2023, coverage begins on February 1, 2023. Employees can apply for coverage by completing the enrollment form available from the Finance Director. GRUW pays the premium.

### ***Group Health Benefit***

Employees can choose one of the two options below for the group health benefit.

#### **Option 1: Group Health Insurance**

This program is designed to provide major medical and prescription plans for employees of GRUW and their dependents. Employees requesting group health insurance must complete the Application Form when they are hired. The plan will be effective after 30 days have been worked. The GRUW Finance Director provides this application form. The effective date of coverage is the month following approval by the insurer. The premium is determined annually by the Human Resources Committee.

**Eligibility:** Employees who regularly work a minimum of 30 hours a week are eligible for this plan. Coverage starts on the first day of the month coincident with the day that employee's one month of service is completed, provided that the employee is actively at work on that date. For example, if an employee is hired January 12, 2021, coverage begins on March 1, 2021. Group health insurance will end on the employee's last day of work except to the extent that is required by applicable law upon termination. Employees can apply for COBRA coverage by completing the form available from the insurer and are responsible for the monthly premium.

**Health Reimbursement Arrangement (HRA) Plan:** Employees covered under the GRUW health insurance may have a contribution to an HRA plan made annually by GRUW at the discretion of the Human Resource Committee of the Board of Directors.

#### **Option 2: Medical Expense Benefit**

Employees can choose to receive a benefit per pay period, amount to be determined annually by the Human Resource Committee of the Board of Directors, to cover out

of pocket medical expenses. With Option 2, the employee may elect to defer some or all this benefit into a Flexible Spending Account on a pre-tax basis to cover medical expenses or receive the benefit on a post-tax basis in their paycheck. Temporary employees are not eligible for medical expense benefit.

### ***Group Dental Insurance***

Employees requesting dental insurance for themselves and their dependents must complete the Application Form when they are hired. The plan will be effective on the first of the month after 30 days have been worked. The GRUW Finance Director provides this application form. The effective date of coverage is the month following approval by the insurer. The premium is determined annually by the Human Resources Committee.

Eligibility: Employees who regularly work a minimum of 30 hours a week are eligible for this plan. Coverage starts on the first day of the month following the employee's start date. For example, if an employee is hired January 12, 2024, coverage begins on February 1, 2024. Dental insurance will end on the employee's last day of work except to the extent that is required by applicable law upon termination.

### ***Simplified Employee Pension Plan (SEP)***

A SEP is a retirement plan in which the employer makes contributions directly to Individual Retirement Accounts (IRAs) established on behalf of its employees. The contribution is reviewed annually and established by the Executive Committee of the Board of Directors. See the Finance Director for more information.

Eligibility: The SEP is a voluntary plan open to employees working at least 20 hours per week who are at least 18 years old.

Enrollment: Enrollment is automatic after 30 days of employment.

### ***Tax-Deferred Annuity (403b)***

The tax-deferred annuity is a voluntary retirement savings plan open to all GRUW employees after the first day of the month coincident with the day that employee's one month of service is completed, provided that the employee is actively at work on that date. Employees make all contributions to the annuity.

Enrollment: Anyone may enroll by completing an application form.

### ***EAP (Employee Assistance Program)***

The EAP program is a service agreement between GRUW and Gundersen Health System. EAP provides counseling and other professional services to employees and their eligible dependents. A detailed listing of services provided is attached and is available from Human Resources.

## ***Workers' Compensation***

Employees are eligible to receive workers' compensation benefits for any injury received at and because of their work for GRUW, as determined by state law. Employees must immediately report any work injury or illness to the Executive Director.

## ***Unemployment Compensation***

Employees who are released from employment may be eligible for unemployment compensation as determined by state law.

All benefits are reviewed annually and approved by the Human Resources Committee. The actual coverage described in the official insurance policy or summary plan description will prevail if there is a conflict in terms.

## **Section 7: Educational and Training Opportunities**

### ***Professional Development Opportunities***

Your personal and professional development matters to GRUW. As deemed appropriate, and based on funds available, career/skills development seminars may be made available to employees. You should submit development/training requests to the Executive Director. You must have approval of the Executive Director prior to enrollment in a job-related seminar, conference within the state, or any out of state seminar or conference.

## **Section 8: Termination of Employment**

### ***Termination of Employment***

1. ***Resignation***: Resignation is a voluntary act initiated by the employee to terminate employment with GRUW. Employees may resign at any time. All employees are requested to give two weeks written notice. Written resignations should be submitted to the Executive Director or direct supervisor and should state the last working date.
2. ***COBRA***: Employees who are eligible may apply for COBRA coverage by completing the form available from the insurer and are responsible for the monthly premiums.
3. ***Final Pay***: Upon termination of employment, payment for accrued and unused vacation will be included in the final paycheck less any amounts owed by the employee to the organization. Before release of a final paycheck, up-to-date expense reports and time sheets should be submitted to the Executive Director.
4. ***Return of Property***: Employees must return all GRUW property immediately upon termination of employment.

5. Exit Interview: Employees who resign or who are released from employment may be requested to take part in an exit interview conducted by the Executive Director or a member of the Human Resources Committee.

Great Rivers United Way  
Employee Handbook  
Acknowledgement Form

I have received a copy of GRUW's Employee Handbook and read and understand its contents. I understand that this Handbook supersedes any previous GRUW Handbook. I also acknowledge that it is my responsibility to consult with the Executive Director regarding any questions not answered in the handbook.

I understand that it is my responsibility to abide by all GRUW rules and regulations as set forth in this Handbook as well as any other oral or written expectations that GRUW may establish in its sole discretion. I also understand that the contents of this Handbook, as well as any compensation or benefits related to my employment, may be changed by GRUW at any time and that every effort for timely communication will be made regarding these changes.

I further understand and acknowledge that this Handbook provides guidelines and information, but this Handbook is not, nor is it intended to constitute, an employment contract of any kind. I understand that my employment may be terminated at the option of either GRUW or me, at any time, for any reason. I understand that this Handbook and the Acknowledgement Form do not vary or modify the at-will employment relationship between GRUW and me.

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Employee's Signature

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Date

After you have read and signed this page, please return it to the Finance Director for placement in your personnel file.



Great Rivers United Way  
HUB Employee Addendum

Due to contractual obligations and protection of confidential records, current employees and potential employees of GRUW with access to Great Rivers HUB clients will be required to pass an initial background check and an exclusion list check. After successfully completing the initial checks, these employees will be screened monthly using an exclusion list check from the Office of Inspector General (OIG) and General Services Administration (GSA). If GRUW discovers someone on one of the exclusion lists, they will immediately remove the person from work directly or indirectly related to Great Rivers HUB clients and an email notification will be sent to the appropriate contracted partner of those clients. Working with confidential client records is an essential function of a Great Rivers HUB position, so the inability to pass an exclusion check may be grounds for dismissal.

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Acknowledgement Form

I have received a copy of GRUW's HUB Employee Addendum and have read and understand its contents.

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Employee's Signature

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Date

After you have read and signed this page, please return the bottom half to the Finance Director for placement in your personnel file.