



## Employee Handbook

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- Revised 2/2022 ..... 1**
  
- Introductory Provisions ..... 4**
  - Mission Statement, Vision and Confirmation of Receipt Statement ..... 5
  - 1.01 Introductory Statement ..... 6
  - 1.02 Governance Responsibility ..... 6
  - 1.03 Responsibilities for Personnel Policies and Procedures ..... 6
  - 1.04 Right to Revise ..... 7
  - 1.05 EEO with ADA Provision ..... 7
  - 1.06 Harassment ..... 8
  - 1.07 Guiding Principles ..... 9
  
- Employment Policies and Practices ..... 11**
- At-Will Employment Relationship ..... 12**
  - 2.01 New Hires ..... 12
  - 2.02 Regular Employees ..... 12
  - 2.03 Full-time Employees ..... 12
  - 2.04 Part-time Employees ..... 12
  - 2.05 Temporary or Relief Employees ..... 12
  - 2.06 Exempt and Non-Exempt Classifications ..... 13
  - 2.07 Job Duties ..... 13
  - 2.08 Work Schedules, Work Week and Telecommuting Agreements ..... 13
  - 2.09 Timekeeping Requirements ..... 14
  - 2.10 Meal and Rest Periods ..... 14
  - 2.11 Payment of Wages ..... 15
  - 2.12 Overtime for Non-exempt Employees ..... 15
  - 2.13 Salary for Exempt Employees ..... 15
  - 2.14 Makeup Time ..... 16
  - 2.15 Reimbursement and Advances for Business Expenses (include Mileage, Travel, Cell Phone, etc.) ..... 16
  - 2.16 Pay Advances ..... 20
  - 2.17 Garnishment and Wage Assignments ..... 20
  - 2.18 Personnel Records ..... 20
  - 2.19 Employee References ..... 21
  - 2.20 Recruitment and Employee Referral ..... 21
  - 2.21 Performance Evaluations ..... 22
  - 2.22 Grievance Procedure ..... 22
  - 2.23 Nepotism Policy ..... 24
  - 2.24 Reductions in Force ..... 25
  - 2.25 Involuntary Termination and Discipline ..... 25
  - 2.26 Voluntary Termination ..... 27
  - 2.27 Final Wages ..... 27
  - 2.28 Rehire Policy ..... 27
  
- Standards of Conduct ..... 29**
  - 3.01 Prohibited Conduct ..... 30
  - 3.02 Off-Duty Conduct and Outside Employment ..... 31
  - 3.03 Confidentiality ..... 32
  - 3.04 Drug and Alcohol Abuse ..... 33
  - 3.05 Punctuality and Attendance ..... 34
  - 3.06 Dress Code and Other Personal Standards ..... 34
  - 3.07 Conduct Standards and Boundaries with Clients ..... 35
  - 3.08 News Media Contacts ..... 37
  - 3.09 Solicitation ..... 37
  - 3.10 Code of Ethics ..... 37
  - 3.11 Conflict of Interest ..... 40

---

3.12 Whistleblower Policy.....	42
<b>Operational Considerations .....</b>	<b>45</b>
4.01 Employer Property.....	46
4.02 Use of Electronic Media and HIPAA Security .....	46
4.03 Health and Safety .....	48
4.04 Safety/Security/Workplace Violence/Disaster Plan.....	48
4.05 Health Certification Requirements for Employment .....	49
4.06 Smoke-Free Workplace .....	50
4.07 Employees Who Are Required to Drive/Policies and Procedures.....	50
4.08 Standards and Use of BWC Email.....	54
4.09 Standards and Use of BWC Voicemail .....	55
4.10 Employees ID Badges and Key Fobs .....	55
4.11 Social Media Policies and Procedures.....	55
4.12 Incident Reporting .....	58
4.13 Program Quality Improvement (PQI) .....	58
4.14 Universal Precautions .....	58
4.15 Staff Portal .....	59
<b>Employee Benefits.....</b>	<b>60</b>
5.01 Holidays .....	61
5.02 Paid Time Off.....	62
5.03 Insurance Benefits and Eligibility.....	63
5.03.02 Eligibility and Terms for Medical/Dental/Vision/Life/AD&D/LTD/Employee Assistance Programs .....	63
5.04 Leaves of Absence .....	65
5.05 Pregnancy Disability Leave .....	65
5.06 Family and Medical Leave/California Family Rights Act .....	66
5.07 Bereavement Leave .....	69
5.08 Personal Leave of Absence without Pay .....	69
5.09 Military Leave .....	70
5.10 Jury Duty and Witness Leave .....	70
5.11 Time Off for Voting .....	71
5.12 Volunteer Firefighters and Peace Officers .....	71
5.13 Domestic Violence or Stalking Leave.....	71
5.14 Victims of Crime Leave .....	72
5.15 School Activities .....	72
5.16 Organ Donor/Bone Marrow Transplant Leave .....	73
5.17 Professional Development.....	73
5.18 Workers' Compensation .....	74

## Introductory Provisions

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## **Mission**

Bill Wilson Center supports and strengthens the community by serving youth and families through counseling, housing, education and advocacy.

## **Vision**

We are working to prevent poverty in the next generation by connecting youth and families to education, employment, housing and positive relationships.

## **Confirmation of Receipt Statement (Confirmation of Receipt SIGN-OFF will be provided separately and returned to HR)**

Please use the Confirmation of Receipt in your new hire packet to acknowledge your receipt and understanding of Bill Wilson Center's Employee handbook. Signed acknowledgements should be submitted to CEO or designee or designee to be kept in personnel files. This acknowledges that you received a copy of the Bill Wilson Center's Employee handbook and understand that it contains important information regarding BWC's general personnel policies and your privileges and obligations as an employee. You acknowledge that you are expected to read, understand, and adhere to Bill Wilson Center's policies and you will familiarize yourself with the material in the handbook. You understand that Bill Wilson Center may rescind or add to any policies, benefits or practices described in the handbook, other than the employment-at-will policies, from time to time in its sole and absolute discretion with or without prior notice. Bill Wilson Center will advise employees of material changes within a reasonable time. You understand that if you have any questions regarding the contents of this handbook, you should ask your supervisor or the CEO or designee for clarification.

## **1.01 Introductory Statement**

Welcome! As an employee of Bill Wilson Center, you are an important member of a team effort. We hope that you will find your position rewarding, challenging, and productive. We are counting on you to become a difference maker along with the rest of our team! BWC thrives on client outcomes, improvement and we hire staff who have a passion for the work, and who believe in the client goals and dreams and the results their hard work produces with our clients!

Because our success depends on the dedication of our employees, we are highly selective in choosing new members of our team. We look to you and the other employees to contribute to the success of Bill Wilson Center! We encourage you to submit recommendations and suggestions through the feature available on the Staff Portal! We listen to your needs!

This employee handbook is intended to explain the terms and conditions of employment of all full-time and part-time employees and supervisors. Written employment contracts between Bill Wilson Center and some individuals may supersede some of the provisions of this handbook.

None of the policies in this employee handbook should be interpreted or applied to interfere with the protected rights of employees to discuss or share information related to their wages, benefits, and terms of employment amongst themselves or with outside parties.

This handbook summarizes the policies and practices in effect at the time of publication. This handbook supersedes all previously issued handbooks and any policy or benefit statements or memoranda that are inconsistent with the policies described here.

## **1.02 Governance Responsibility**

Bill Wilson Center is governed by the Board of Directors in accordance with Bill Wilson Center Bylaws.

The Board of Directors delegates the management of the organization to the CEO. The CEO or designee has the responsibility to plan and direct operations; to interview, hire, suspend or terminate and lay off staff, in accordance with established personnel policies and procedures; to develop rules and regulations; to introduce new or improved methods or facilities; and, in all respects, to carry out the ordinary and customary functions of management.

## **1.03 Responsibilities for Personnel Policies and Procedures**

- a. The Board of Directors is responsible for approving all policies set forth in this manual.
- b. The CEO or designee is responsible for devising administrative procedures to implement the personnel policies in this manual. Any changes in administrative procedures must be approved by the CEO or designee.
- c. C-Level Executives, Division Directors, Directors and Managers are responsible for the day to day implementation of the personnel policies and procedures.
- d. Employees are responsible for adhering to the policies and procedures, under the general direction of the CEO, Executive Management, Directors and their manager.

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- e. All Employees will read the employee handbook and sign the Confirmation of Receipt Form, which will be placed in their personnel file.

## 1.04 Right to Revise

This employee handbook contains the employment policies and practices of Bill Wilson Center in effect at the time of publication. All previously issued handbooks and any inconsistent policy statements or memoranda are superseded.

Bill Wilson Center reserves the right to revise, modify, delete, or add to any and all policies, procedures, work rules, or benefits stated in this handbook or in any other document, except for the policy of at-will employment.

Any written changes to this handbook will be distributed to all employees so that employees will be aware of the new policies or procedures. No oral statements or representations can in any way alter the provisions of this handbook.

This handbook sets forth the entire agreement between you and Bill Wilson Center as to the duration of employment and the circumstances under which employment may be terminated. Nothing in this employee handbook or in any other personnel document, including benefit plan descriptions, creates or is intended to create a promise or representation of a contract or continued employment for any employee.

## 1.05 EEO with ADA Provision

Bill Wilson Center is an equal opportunity employer and makes employment decisions on the basis of merit. We want to have the best available people for every position. Our policy prohibits unlawful discrimination based on race, traits historically associated with race including, but not limited to hair texture and protective hairstyles, including braids, locks and twists, age, ancestry, color, religious creed (including religious dress and grooming practices), disability (mental and physical) including HIV and AIDS, marital or family status, medical condition (cancer and genetic characteristics), genetic information, military and veteran status, national origin (including language use restrictions), sex (which includes pregnancy, childbirth, breastfeeding and medical conditions related to pregnancy, childbirth and breastfeeding), gender, gender identity, gender expression and sexual orientation or any other basis protected by federal, state, or local law, ordinance or regulation. It also prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics. All such discrimination is **unlawful**. Discrimination is also prohibited against an undocumented person in possession of a state issued driver's license. This policy extends to interns and volunteers.

Bill Wilson Center is committed to compliance with all applicable laws providing equal employment opportunities. This commitment applies to **all** persons involved in Bill Wilson Center operations and prohibits discrimination by any employee of Bill Wilson Center, including supervisors and coworkers. Bill Wilson Center will not discriminate in any pay practices.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, Bill Wilson Center will make reasonable accommodations for the known physical or mental limitations of an otherwise qualified individual with a disability who is an applicant or an employee unless undue hardship would result.

Any applicant or employee who requires an accommodation in order to perform the essential functions of the job should contact the CEO or designee and request such an accommodation. The interactive process starts with the individual when they specify what accommodation he or she needs to perform

the job. Bill Wilson Center then will conduct an investigation to identify the barriers that interfere with the equal opportunity of the applicant or employee to perform his or her job. Bill Wilson Center will identify possible accommodations, if any, that will help eliminate the limitation. If the accommodation is reasonable and will not impose an undue hardship, Bill Wilson Center will make the accommodation.

If you believe you have been subjected to any form of unlawful discrimination, submit a written complaint to your supervisor or any one on the executive team. Your complaint should be specific and should include the names of the individuals involved and the names of any witnesses. If you need assistance with your complaint, or if you prefer to make a complaint in person, contact the CEO or designee, Chief Program Officer, or any Division Director. If the complaint is against the CEO, contact the Board President. Bill Wilson Center will immediately undertake an effective, thorough, and objective investigation and attempt to resolve the situation.

If Bill Wilson Center determines that unlawful discrimination has occurred, effective remedial action will be taken commensurate with the severity of the offense. Appropriate action will also be taken to deter any future discrimination. Bill Wilson Center will not retaliate against you for filing a complaint and will not knowingly permit retaliation by management employees or your coworkers.

## **1.06 Harassment**

Bill Wilson Center is committed to providing a work environment free of harassment. BWC's policy prohibits sexual harassment and harassment based on age (40 and over), ancestry, color, religious creed (including religious dress and grooming practices), denial of family and medical care leave, disability (mental and physical) including HIV and AIDS, marital or family status, medical condition (cancer and genetic characteristics), genetic information, military and veteran status, national origin (including language use restrictions), race, traits historically associated with race including, but not limited to hair texture and protective hairstyles, including braids, locks and twists, sex (which includes pregnancy, childbirth, breastfeeding and medical conditions related to pregnancy, childbirth and breastfeeding), gender, gender identity, gender expression and sexual orientation or any other basis protected by federal, state, or local law, ordinance or regulation. All such harassment is unlawful. BWC's anti-harassment policy applies to all persons involved in the operation of the agency and prohibits harassment by or towards any employee of the agency, including coworkers, third parties, supervisors, managers, independent contractors and any other persons. It also prohibits harassment based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics.

BWC will not inquire about or seek documentation regarding sex, gender, gender identity, or gender expression as a condition of employment.

In addition, BWC prohibits harassment or discrimination of any employee who is transitioning, has transitioned, or is perceived to be transitioning. Transitioning is defined as a process some transgendered persons go through to begin living as the gender with which they identify, rather than the gender assigned to them at birth. Some of the examples of transitioning include changes in name and pronoun usage, facility usage, and undergoing hormone therapy or other medical procedures. BWC will abide by an employee's request to be identified by a certain name or pronoun, including gender-neutral pronouns. BWC will only insist on using an employee's legal name or gender if required by law to do so.

Sexual harassment includes; unwelcome or unwanted sexual advances, requests for sexual favors, and other verbal, non-verbal, or physical conduct of a sexual nature when (1) submission to or rejection of this conduct by an individual is used explicitly or implicitly as a factor in decisions affecting hiring, evaluation, promotion, or other aspects of employment; or (2) this conduct substantially interferes with an individual's employment or creates an intimidating, hostile, or offensive work environment.

Prohibited harassment for any protected category includes, but is not limited to, the following behavior:

- Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations, or comments;
- Visual displays such as derogatory and/or sexually-oriented posters, photography, cartoons, drawings, or gestures;
- Physical conduct including assault, unwanted touching, intentionally blocking normal movement or interfering with work because of sex, race, or any other protected basis;
- Threats and demands to submit to sexual requests as a condition of continued employment, or to avoid some other loss, and offers of employment benefits in return for sexual favors; and
- Retaliation for reporting or threatening to report harassment.

If you believe that you have been harassed, submit a written complaint to the CEO or designee, the Chief Program Officer or a Division Director as soon as possible after the incident. You will be asked to provide details of the incident or incidents, names of individuals involved, and names of any witnesses. If the complaint involves allegations against the CEO, the complaint should be reported to the Board President. Bill Wilson Center will immediately undertake an effective, thorough, and objective investigation of the harassment allegations. The investigation will be conducted as confidentially as possible.

If Bill Wilson Center determines that harassment has occurred, effective remedial action will be taken in accordance with the circumstances involved. Any employee determined by Bill Wilson Center to be responsible for harassment will be subject to appropriate disciplinary action, up to, and including termination. Bill Wilson Center will not retaliate against you for filing a complaint and will not tolerate or permit retaliation by management, employees or co-workers.

Bill Wilson Center encourages all employees to report any incidents of harassment forbidden by this policy *immediately* so that complaints can be quickly and fairly resolved. Managers are required to immediately report any incidents of harassment reported to them or witnessed by them. You also should be aware that the Federal Equal Employment Opportunity Commission and the California Department of Fair Employment and Housing investigate and prosecute complaints of prohibited harassment in employment. If you think you have been harassed or that you have been retaliated against for resisting or complaining, you may file a complaint with the appropriate agency.

## 1.07 Guiding Principles

2022 Update: BWC will be working with leadership to update the Diversity and Guiding Principle.

**These are the underlying principles for all of Bill Wilson Center:**

**Least Restrictive Environment:** We help people solve problems at the family and community level; public institutions are a last resort.

**Diversity:** We provide services that meet the needs of our whole community. We value our unique cultures and differences as individuals. Our staff, volunteers, and clients reflect our community.

**Asset Building:** We look for the positive in each person and build on strengths.

**Youth Development:** We support youth. We build leadership skills by involving youth in programs and planning for their future.

**Advocacy & Social Justice:** We expand equity and justice for youth and families while eliminating systemic bias, bigotry and racism.

**Collaborations:** We work with others to provide a continuum of services.

**No Fail:** Everyone can be successful. We keep trying.

**Families Matter:** Our Goal is to keep families together and build reconnections to families. We recognize that “families” come in all shapes and sizes.

## **Employment Policies and Practices**

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## **At-Will Employment Relationship**

Bill Wilson Center is an at-will employer. As such, employment is for no specified amount of time and either party may terminate this employment relationship at any time, with or without cause.

### **2.01 New Hires**

An introductory employment period lasts up to six (6) months at Bill Wilson Center. During this time, you will learn your responsibilities, get acquainted with fellow employees, and determine whether or not you are happy with your new position. Your supervisor will closely monitor your performance as well. You may be released at any time – whether it is during the introductory period or after – if your work and/or behavior are unsatisfactory.

Prior to completion of the introductory period, Bill Wilson Center will review your performance. If Bill Wilson Center finds your performance satisfactory and decides to continue your employment, it will advise you of any improvements expected from you. Completion of the introductory period does not entitle you to remain employed by Bill Wilson Center for any definite period of time, but rather allows both you and Bill Wilson Center to evaluate whether or not you are right for the position.

Managers may request an extension of a new hires' introductory period for up to 90 days after 6 months of hire.

### **2.02 Regular Employees**

Upon satisfactory completion of the introductory period, the employee will be considered a regular employee. Regular employees are those who are hired to work on a regular schedule. Regular employees may be classified as full-time or part-time.

### **2.03 Full-time Employees**

Regular full-time employees are those who are scheduled for and work 32-40 hours per week (as determined by the applicable job description). Regular full-time employees are eligible for most employee benefits described in this handbook on the first day of the month after the employee is hired.

### **2.04 Part-time Employees**

Part-time employees are those who are scheduled for and work fewer than 32 hours per week. Part-time employees are eligible for some Bill Wilson Center fringe benefits on a prorated basis according to hours worked (e.g., prorated holidays and PTO). Regular part-time employees working a standard work week of 24 to 31 hours are eligible for health and dental insurance on a pro-rated basis – that is the employee will pay part of the insurance premiums based on their standard work week hours.

Extra hours worked to substitute or complete tasks are not included in the term "regularly scheduled" hours for purposes of entitlement or calculating fringe benefits.

### **2.05 Temporary or Relief Employees**

Temporary employees are those employed for short-term assignments. Short-term assignments generally are periods of three months or fewer; however, assignments may be extended. Temporary employees are not eligible for employee benefits except those mandated by applicable law.

Relief employees are employed to fill in as needed in programs that operate 24x7. Relief employees are not guaranteed hours or a regular schedule and are not eligible for employee benefits except those mandated by applicable law.

## 2.06 Exempt and Non-Exempt Classifications

Each employee position at Bill Wilson Center is classified as Exempt or Non-exempt. Exempt employees are paid a fixed salary, which is intended to cover all of the compensation to which they are entitled. Because the work they do is exempt from overtime regulations, such employees are not entitled to additional compensation for working more than 8 hours in a day or 40 hours in a work week. Non-exempt employees are paid hourly and would be eligible for overtime pay, subject to the overtime provisions of the law.

## 2.07 Job Duties

During the introductory period, your supervisor will explain your job responsibilities and the performance standards expected of you. Be aware that your job responsibilities may change at any time during your employment. From time to time, you may be asked to work on special projects, or to assist with other work necessary or important to the operation of Bill Wilson Center. Your cooperation and assistance in performing such additional work is expected.

Bill Wilson Center reserves the right, at any time, with or without notice, to alter or change job responsibilities, reassign or transfer job positions, or assign additional job responsibilities. Any change in employment status will be provided to you in writing.

## 2.08 Work Schedules, Work Week and Telecommuting Agreements

The workweek begins at 12:01 a.m. Sunday and ends at midnight on the following Saturday. Therefore, the workweek runs Sunday through Saturday.

Regular full-time employees are those who are scheduled for and work 8 hours a day and/or 40 hours per week. Regular part-time employees are those who are scheduled for and work fewer than 40 hours per week.

Your work schedules, starting and ending times will be assigned to you by your supervisor when you start your employment at Bill Wilson Center.

Daily and weekly work schedules may be changed from time to time at the discretion of Bill Wilson Center to meet varying conditions of the agency. Changes in work schedules will be announced as far in advance as possible.

Bill Wilson Center will consider allowing regular full-time and part-time employees who have successfully completed their introductory period some flexibility in connection with performing their duties and responsibilities and balancing other areas of interest such as schooling and internships. Employees interested in being considered for a change to their regular work schedule should discuss the matter with their supervisor. Changes cannot be granted automatically but will be considered on a case-by-case basis, based on job-related factors such as the nature of the employee's job, department work flow, client service needs, etc. A change to your work schedule is considered a privilege. To be eligible for consideration an employee must be in good standing on the basis of their overall work record. Before being granted authorization to change your work schedule an employee must prepare and sign a **Change of Work Schedule Form**. Before a change of work schedule can begin, this form must be approved by the CEO or designee in addition to the employee's supervisor.

In addition, employees must understand that regardless of the type of work schedule under which they are working, business requirements may necessitate your being in the office at times you would normally be off. The change of work schedule may be discontinued by Bill Wilson Center at any time at its discretion.

From time to time, Bill Wilson Center may approve telecommuting agreements with certain employees. Requests for Telecommuting must be presented to the CEO or designee and must be approved by the CEO or designee. Not all employees and positions are eligible for telecommuting and BWC will review requests on a case by case basis with approval based on the needs and requirements of the agency and programs. The telecommuting agreement may be discontinued by Bill Wilson Center at any time at its discretion.

## 2.09 Timekeeping Requirements

All employees are responsible for filling out time sheets for payroll purposes and/or agency contract compliance requirements. Employees must record their own time at the start and at the end of each work period, including before and after the lunch break if the employee is non-exempt (paid hourly). Non-Exempt employees also must record their time whenever they leave the premises for any reason other than Bill Wilson Center business.

All employees must complete a timesheet in the Paycom payroll system on a biweekly basis. Allocation of time must also be completed when time is entered in the Paycom payroll system. The timesheet should be approved within the appropriate timeframe allowing time for supervisor to complete a review and final approval of the timesheet in the Paycom payroll system by the deadline.

Any errors on your time sheet should be reported immediately to your supervisor. Any employee responsible for approving timesheets is responsible for ensuring accuracy of timesheets that they approve.

Any questions about timesheets, allocations, paychecks, deductions/garnishments or other payroll related issue should be directed to the Director of Finance.

## 2.10 Meal and Rest Periods

Employees are allowed a 10-minute rest period for every four hours of work or major portion thereof. Non-exempt employees are also entitled to receive an unpaid meal period of no less than 30 minutes when scheduled to work for more than 5 hours. You are entitled to be relieved of all duties during the meal period and rest period. If your work shift is to be six hours or less, you may waive the right to take a meal period. If you are working more than 10 hours in a shift, you are entitled to a second meal break, to be taken before the 10th hour of work. Some managers may provide a one-hour meal period depending on program needs and schedules.

Your supervisor will schedule your meal and rest periods. You are expected to observe your assigned working hours and the time allowed for meal and rest periods.

Our policy is that you are provided the opportunity to take duty-free rest breaks and meal breaks. **If you work in a 24x7 program, you may be asked if you would like to voluntarily give up your meal period and be paid OT for working through your meal break/eating while on shift due to staffing requirements at certain programs not being enough to support 2 staff allowing for coverage during meal breaks.**

Non-exempt employees are required to record their meal periods for payroll purposes. You must record, in Paycom, your own time at the start and at the end of each work period, including before and after meal breaks. Please notify the HR Manager if you were denied a meal break.

## 2.11 Payment of Wages

Paychecks are normally available by 1 p.m. on pay days at the main office front desk. If you observe an error on your check, please report it immediately to your supervisor. It is recommended that employees take advantage of direct deposit and may be required in the near future. To set up direct deposit, please complete a Direct Deposit Authorization form and voided check (form available on staff portal) or a Direct Deposit Confirmation Printout from your bank and submit it to the HR Manager (BWC cannot process a request for direct deposit without one of these verifications of account).

### 2.11.01 Biweekly Payments

All employees of Bill Wilson Center are paid every other Thursday for work performed during the previous two-week pay period. If a regular payday falls on a holiday, employees will be paid on the last day worked before the holiday.

## 2.12 Overtime for Non-exempt Employees

Employees may be required to work overtime as necessary. Only actual hours worked in a given workday or workweek can apply in calculating overtime. Therefore, hours paid for personal time off (PTO) or other leave which are not actually worked will not be considered for purposes of calculating overtime. Bill Wilson Center will attempt to distribute overtime evenly and accommodate individual schedules. All overtime work must be previously authorized by a supervisor. Bill Wilson Center provides compensation for all overtime hours worked by non-exempt employees in accordance with state and federal law as follows:

- All hours worked in excess of eight hours in one workday or 40 hours in one workweek will be treated as overtime. A workday begins at 12:01 a.m. and ends at midnight 24 hours later. Workweeks begin each Sunday at 12:01 a.m.;
- Compensation for hours in excess of 40 for the workweek, or in excess of eight and not more than 12 for the workday, and for the first eight hours on the seventh consecutive day of work in one workweek, shall be paid at a rate one and one-half times the employee's regular rate of pay;
- Compensation for hours in excess of 12 in one workday and in excess of eight hours on the seventh consecutive workday in a workweek shall be paid at double the regular rate of pay.

### 2.12.01 Shift Differential

All BWC non-exempt employees are eligible for a 5% shift differential if assigned to work any hours between 11:00 p.m. to 7:00 a.m. Also, in times of emergency (i.e., Covid outbreak) extra pay may be added to assure night shifts are covered. This action needs to be approved by CEO.

## 2.13 Salary for Exempt Employees

Exempt employees will receive their salary for any week in which they perform any work. For purposes of this salary pay policy, a week is Monday 12:01 a.m. through Sunday midnight. An employee will receive his or her full salary for any week in which an employee does any work, subject to the following rules:

- An employee's salary may be reduced for daily absence of 4 hours or more due to personal leave, before PTO benefits accrue or after they are exhausted, and incomplete initial and final weeks of work; and
- An employee's salary will not be reduced due to partial weeks of work due to service as a juror, witness, or in the military, or for lack of work.

- Employees are encouraged to direct any questions concerning their salary pay to the CEO or designee so that any inadvertent error can be corrected.

## 2.14 Makeup Time

Bill Wilson Center allows the use of makeup time when non-exempt employees need time off to tend to personal obligations. Makeup time worked will not be paid at an overtime rate.

Employees may take time off and then make up the time later in the same workweek, or may work extra hours earlier in the workweek to make up for time that will be taken off later in the workweek.

Makeup time requests must be submitted in writing to your supervisor, with your signature, on the appropriate **Makeup Time Request Form** found on the staff portal. Requests will be considered for approval based on the legitimate business needs of Bill Wilson Center at the time the request is submitted. A separate written request is required for each occasion the employee requests makeup time.

If you request time off that you will make up later in the week, you must submit your request at least 24 hours in advance of the desired time off. If you request to work makeup time first in order to take time off later in the week, you must submit your request at least 24 hours before working the makeup time. Your makeup time request must be approved in writing before you take the requested time off or work makeup time, whichever is first.

All makeup time must be worked in the same workweek as the time taken off. The agency's seven-day workweek is Sunday through Saturday. Employees may not work more than 11 hours in a day or 40 hours in a workweek as a result of making up time that was or would be lost due to a personal obligation.

If you take time off and are unable to work the scheduled makeup time for any reason, the hours missed will normally be unpaid. However, your supervisor may arrange with you another day to make up the time if possible, based on scheduling needs. If you work makeup time in advance of time you plan to take off, you must take that time off, even if you no longer need the time off for any reason.

An employee's use of makeup time is completely voluntary. Bill Wilson Center does not encourage, discourage, or solicit the use of makeup time.

## 2.15 Reimbursement and Advances for Business Expenses

Work-related expenses will be reimbursed to the employee upon presentation of a "Reimbursement Request" form signed by the proper supervisor, and accompanied by receipts. All business related expenses must have prior approval. Employees should have approval for the expense prior to making any purchase.

NO REIMBURSEMENT will be made without appropriate receipts.

Examples of appropriate receipts are:

- 1) cashier's tape (with name of company, date and amount); and
- 2) a dated and signed receipt from a company with their name embossed (or with ink stamp) on the paper/form and clearly showing amount paid and description of item/service. Before making a purchase for Bill Wilson Center, please make sure the company can produce an appropriate receipt.

Staff who request advances to buy supplies for programs or events are required to submit the check stub from the advance check along with all receipts and leftover money within 7 days after the event. Left over funds from advance checks should NOT be carried over for other events. A new advance request should be made for each event. New advances will NOT be processed for staff that has outstanding advances.

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### 2.15.01 Accounting Considerations and Restrictions

Employees should NEVER incur an expense on behalf of BWC without prior approval. It is the responsibility of the employee and supervisor to ensure that requests submitted to Accounting for processing are approved expenses. BWC reserves the right to deny reimbursement and/or place staff on corrective action if expenses are not properly approved or receipts are not submitted according to BWC policy and procedures. BWC will not reimburse for alcohol at program events (staff appreciation events arranged by the Board are exempted).

Employees are responsible for knowing and adhering to all accounting policies and procedures. Any questions about any accounting policies and procedures should be directed to your supervisor or the Controller.

The following policies and procedures must always be adhered to:

- Cash, checks, gift cards, credit cards, and receipts should be safeguarded and never left unattended, on desks, in purses or wallets, or in unlocked cabinets or desks.
- Gift cards purchased with agency funds should be returned to the Finance Department the same day they are purchased and be locked in the Director of Finance's fireproof safe. Checks will be issued in the name of the vendor/store only, not under the name of the employee requesting the check.
- Credit cards should not be given or lent to unauthorized users.
- Each program should have a fireproof safe or locking desk or cabinet(s). Each employee should be provided with a safe place to temporarily store agency assets and personal assets while at work.
- Appropriate receipts and any change for items purchased with agency funds should be returned to the Finance Department as soon as possible, no later than 7 days after cash, check or gift card is picked up for advances, and by the 5<sup>th</sup> day following the end of each month for credit card purchases.
- Examples of appropriate receipts are:
  - cashier's tape (with name of company, date and amount); and
  - dated and signed receipt from a company with their name embossed (or with ink stamp) on the paper/form and clearly showing amount paid and description of item/service. Before making a purchase for Bill Wilson Center, please make sure the company can produce an appropriate receipt.
- In addition, any support funds or items given directly to a client must be signed for proving receipt of the participant support by the client.
- Employees must report loss of cash, checks, gift cards, or credit cards as soon as possible to their manager and the Director of Finance, but no later than 24 hours after becoming aware.
- BWC reserves the right to deny reimbursement and/or place staff on corrective action if cash, gift cards, and credit cards are not used and stored safely, expenses are not properly approved, or adequate receipts are not submitted in a timely manner.

- Check requests for advances will not be issued to any one employee for a total amount more than \$500.00. The total of all open advances cannot be more than \$500.00 at a time. An exception is allowed for weekly advance requests for Crisis Residential, Quetzal House, and other 24/7 program food and supplies which can be issued for an amount up to \$750.00.
- Staff will sign an acknowledgement with the Company and may be held personally liable for gross negligence or dishonest use of Company assets, including cash, checks, gift cards, credit cards, and other Company property.

Employees who violate these policies and procedures will be subject to corrective action up to including termination of employment. BWC will prosecute to the fullest extent of the law any employee found negligent or dishonest in using BWC funds, credit cards, gift cards and other BWC property.

### **2.15.02 Check Advances for Business Expenses**

Employees who request advances via check to buy supplies for programs or events are required to submit the check stub from the advance check along with all receipts and leftover money within 7 days after the request. Left over funds from advance checks should NOT be carried over for other purchases; a new advance request should be made. **New advances will NOT be processed for employees who have outstanding advances (this can create a performance issue for the employee).**

### **2.15.03 Cash or Gift Card Advances**

Employees who request an advance to buy supplies for programs or events by cash or gift card are required to make a copy of the request form and turn in the receipt(s) stapled to the front of the copy. Employees must write the word "COPY" on the request form being returned with receipts, so it is clear they are just turning in the receipt and not making a new request. Appropriate receipts and any change for items purchased with agency funds should be returned to the Finance Department as soon as possible, no later than 7 days after receipt. **New requests for cash or gift cards will NOT be processed for employees who have outstanding receipts from previous requests (this can create a performance issue for the employee).**

### **2.15.04 Employees with Authorized BWC Credit Cards**

Employees who are approved to use BWC credit cards to make purchases must turn in original receipts to Accounting by the 5<sup>th</sup> day of the month following the date of purchase. All receipts must be approved by the Director of your program, via initials and date of review. Purchases over \$100 require approval from Accounting PRIOR to making the purchase. Use a check/reimbursement/advance/gift card request form with manager approval and fax it to the Director of Finance who will get approval from the Division Director or Chief Program Officer. **The Director of Finance or appointee will notify you by email if your request is approved.**

Employees who use a BWC Wells Fargo credit card for purchases will be required to submit receipts by the 5<sup>th</sup> of each month along with a copy of their Wells Fargo reconciliation register. The register or the receipts must be signed by the Director of your program, via initials and date of review. Furthermore, all credit card purchases of \$100 or more require approval from Accounting PRIOR to making the purchase. Use a check/reimbursement/advance/gift card request form with manager approval and fax it to the Director of Finance who will get approval from the Division Director or Chief Program Officer. **The Director of Finance or appointee will notify you by email if your request is approved.**

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### 2.15.05 Reimbursement for Out-of-Area Travel

Only exempt staff will be required, at times, to travel out of the area on Bill Wilson Center business. Following are the guidelines for this travel:

Staff may be reimbursed for out-of-area travel expenses on Bill Wilson Center business. Reimbursement for travel will be based on the most economical mode of travel as determined by the CEO or designee. All travel arrangements will be made by the Executive Assistant. For airline travel, the agency will choose whether to purchase an advance fare ticket that may have penalties if the travel is not completed. If such a ticket is purchased, the travel cannot be canceled by an employee except for illness with the approval of the CEO. If the employee chooses to change such a ticket for personal reasons, the employee must pay the difference for the ticket.

Staff will only be reimbursed for one (1) excess/checked baggage fee.

Staff will be reimbursed for local ground travel from their home to the local airport using the most reasonable means of transport. Staff will be reimbursed for ground travel from destination airport to place where business is occurring. Staff is requested to seek ground transportation that is reasonable. **For example, if a taxi costs \$50, we request staff take other less expensive means, if available including using Lyft.**

Staff will receive a per diem of **\$56** a day for meals and incidentals including in-town travel. **Per Diem is \$9 for breakfast, \$13 for lunch, \$29 for dinner and \$5 for incidentals, for a total of \$56.** Per diem will be adjusted on the day of travel and the day of return depending on time of travel and other considerations. If staff members are attending a conference that includes meals in the conference fee paid by the agency, then the per diem rate may be adjusted. The Director of Finance maintains the chart of pro-rated per diem and will communicate to staff when their travel is being arranged.

Hotel cost will be reimbursed by the agency and will be approved, in advanced, by the CEO or designee.

All receipts, including hotel, airline tickets, and ground transportation must be turned into the Director of Finance.

The CEO will be reimbursed for reasonable business expenses when traveling and can use the company credit card for these expenses.

Staff traveling to conferences will not receive additional compensation for time traveling on weekends or other times that are not during their normal working hours.

### 2.15.06 Reimbursement for Mileage

Staff using their own vehicles for Bill Wilson Center business may be reimbursed by the agency for mileage. For reimbursement, supervisors must approve the travel in advance. All out-of-county travel (over 50 miles) must be approved in advance by the CEO or designee. Each staff member must have a copy of their current car insurance policy number and their driver's license number on file with the CEO or designee. Bill Wilson Center has supplemental insurance on all staff using personal vehicles used to transport youth for agency business. Staff using personal vehicles will have their driving record checked. The driving record must meet the requirements of Bill Wilson Center's insurance company.

Staff is reimbursed for travel from their worksite only. Worksites include all Bill Wilson Center offices and school sites for school outreach counselors. Travel will be reimbursed for commuting between worksites, but will not be reimbursed for commuting from or to home. If staff is traveling to a Bill Wilson Center meeting directly from their home, then the agency will reimburse travel cost for the lesser distance to the

meeting or event. Thus, if the distance is closer to their home than from their worksite then the staff member will only be reimbursed for the shorter distance. Mileage is reimbursed at the IRS published rate and will be adjusted each January 1st. Reimbursement for parking and tolls must be accompanied by receipts. Costs for using parking meters will not be reimbursed and employees should opt for the least expensive parking method/location. The reimbursement form, using the new mileage reimbursement program in the CMS system, must be approved by your supervisor and turned in on a monthly basis by the end of the following month (for example, mileage reimbursement for September must be turned in to Accounting by October 31<sup>st</sup>).

Mileage reimbursement requests for sessions with clients **MUST** include the client number in the PURPOSE section of the Mileage Reimbursement Form. After 7/1/2018, any mileage reimbursement requests for client sessions that do not indicate a client number will be excluded from approved reimbursements.

### **2.15.07 Reimbursement for Required Cell Phone Use**

Only staff required to use their cell phone for BWC business will be authorized for reimbursement. The list of authorized staff is maintained by the Director of Finance. Staff will be reimbursed up to \$30 per month (this amount is prorated for part time staff) for cell phone use. Staff must submit to Accounting a reimbursement request approved by their supervisor along with a copy of the front page of their cell phone bill **showing date and amount due**. Requests must be submitted monthly. Requests for reimbursements without appropriate bill attached and requests from unauthorized staff will be denied reimbursement and returned to supervisor for review and discussion with the employee.

### **2.16 Pay Advances**

For unusual and/or emergency situations Bill Wilson Center will permit a one-week advance against work time already accrued. This means that you must have worked a full work week before requesting a one week pay advance. Use a Pay Advance Request Form with manager approval and fax it to the Director of Finance. Only one (1) advance may be requested per quarter and new advances will not be processed until previous advances have been reconciled.

Bill Wilson Center does not permit advances against personal time off (PTO). New hires are not eligible for Pay Advances during their 6-month introductory period.

### **2.17 Garnishment and Wage Assignments**

Garnishments and wage assignments are legal permission for creditors to collect directly from an employee through his/her employer. If you are subject to a garnishment or wage assignment, the records will be kept in the CEO or designee's office in a confidential file and are not considered a part of the employee's personnel file.

### **2.18 Personnel Records**

It is important that our personnel records are accurate at all times. In order to avoid problems with your benefit eligibility, tax liability, or our ability to communicate with you regarding schedule changes and other important details, employees are responsible for maintaining updated personal information in Paycom including name, address, contact number, emergency contact, personal email address, dependent information or any other personal information in Paycom.

You have a right to inspect certain documents in your personnel file, as provided by law, in the presence of a Bill Wilson Center representative at a mutually convenient time. Employees, former employees, or their designated representative, have the right to examine their personnel file within 30 days of a request. The right to review personnel documents excludes letters of reference, documents related to criminal investigations, and privileged documents. Employees, or their representative, may request a copy of material in the file, but may not alter, add to, or delete any existing information in the personnel file. You may add your comments to any disputed item in the file.

Bill Wilson Center will restrict disclosure of your personnel file to authorized individuals within Bill Wilson Center. Any request for information contained in personnel files must be directed to the CEO or designee. Only the CEO or designee is authorized to release information about current or former employees. Disclosure of personnel information to outside sources will be limited to Bill Wilson Center cooperating with requests from authorized law enforcement or local, state, or federal agencies conducting official Community Care Licensing investigations and as otherwise legally required.

## **2.19 Employee References**

All requests for references or other information about a current, retired or terminated employee must be handled by a member of the management team under the direction of the CEO or designee. By policy, Bill Wilson Center discloses only the dates of employment and the title of the last position held of former employees. If you authorize the disclosure in writing, Bill Wilson Center also will disclose the additional information you authorize.

Information requested by a law enforcement agency will be provided if it is believed that an applicant or employee has engaged in illegal activities; if actions of the individual threaten physical injury to agency property, other employees or persons served; or to protect the legal interest of the agency. In such cases, any release of information will be made only if approved by the CEO or designee.

## **2.20 Recruitment and Employee Referral**

When a vacancy occurs Bill Wilson Center will provide sufficient information and announcement time so that a pool of qualified applicants will have access to the opening.

All job announcements will be posted on the Bill Wilson Center website.

The CEO or designee distributes position vacancy announcements to external agencies and community interest groups. As approved by the CEO or designee, BWC may advertise the position in appropriate recruiting sites and/or expand the recruitment effort beyond local boundaries to recruit the best qualified candidates. Bill Wilson Center has an Affirmative Action Plan that is incorporated into the agency's hiring process.

When a challenge in recruiting occurs, the CEO or designee may approve an Employee Referral Bonus program. When approved, details are sent to all staff via email.

### **2.20.01 Internal Promotion of Employees**

Bill Wilson Center shall encourage promotion from within whenever possible. Promotion of Bill Wilson Center employees depends on:

- Availability of authorized positions;

- Competence and job-related qualifications of the individual applicant;
- Recommendation of the supervisor of the vacant position.

At times, internal candidates may be given a deadline by which to apply for an internal opening. Any regular, full time or part-time employee may apply for a Bill Wilson Center opening provided he/she is not on a Corrective Action Plan or Probation status. **Current employees must notify their supervisor prior to applying for an internal position.** **New hires employed 6 months or less and temporary employees must have approval from their supervisor before applying for a Bill Wilson Center opening in another program or department.**

When a position is posted internally, interested candidates must submit a letter of interest, and an update to his/her employment application and resume to [resumes@bwcmail.org](mailto:resumes@bwcmail.org).

## 2.21 Performance Evaluations

Each employee will receive periodic performance reviews conducted by his or her supervisor. Your first performance evaluation will take place before completion of your introductory period. If you pass your introductory period and your status is changed to regular employee, you will receive quarterly check-ins as well as annual performance evaluations that will include review of accomplishments, discussion of professional development status and goals, planning future goals and discussing your plans for growth with the agency.

Your performance evaluations may review factors such as the quality and quantity of the work you perform, your knowledge of the job, your initiative, your work attitude, and your attitude toward others. After the annual review, you will be required to sign the evaluation report simply to acknowledge that it has been presented to you, that you have discussed it with your supervisor, and that you are aware of its contents. You will also have an opportunity to include any comments in the Staff Comment section of the evaluation. The review will be placed in your personnel file.

## 2.22 Grievance Procedure

*NOTE: Nothing in this policy changes the basic at-will nature of your employment.* Each regular employee has the right to file a grievance concerning any employment-related matter or action that a supervisor takes against the employee. Employment-related matters and actions include, but are not limited to, the terms and conditions of employment, discipline other than termination, treatment by supervisors, or other personnel matters. New employees have no appeal rights during their introductory period and former employees may not use the grievance procedure.

**Appeal Procedure:** The employee should initially discuss his/her concern over the employment related matter or action with the immediate supervisor. If the matter cannot be resolved or if the supervisor is unavailable or the employee is not comfortable discussing with their immediate supervisor, the employee should then discuss the matter with the Division Director. If the informal resolution of the problem is impossible, the employee may present a formal grievance in writing.

### 2.22.01 Complaint: First Step

If the problem is not resolved verbally, the complaining employee must document his/her complaint in writing and file the complaint within five (5) working days of the knowledge of the occurrence. The supervisor investigates the problem in order to gain a thorough understanding of the circumstances surrounding it. Once this has been done, the supervisor attempts to resolve the employee's complaint.

The supervisor or his/her designee is required to respond to the employee's complaint in writing within five

(5) working days from the time the supervisor receives the written complaint. If resolution at this level is not possible, or the employee's supervisor has not responded to the employee within the required number of days, then the employee may appeal to the next level of supervision.

### **2.22.02 Complaint: Second Step**

If an employee is dissatisfied with the supervisor's decision, the employee must appeal this decision in writing to the CPO, within five (5) working days of receiving the written decision. If the employee fails to communicate dissatisfaction with the supervisor's decision within five (5) working days, the Bill Wilson Center shall consider the matter settled and closed and no further appeal by the employee will be considered.

Bill Wilson Center's CPO must respond in writing to the appeal within five (5) working days of the filing of the appeal. Bill Wilson Center's CPO reviews the complaint and makes a thorough investigation of the circumstances which may include meeting with employee and/or supervisor. Upon reaching a decision, CPO may meet with the supervisor and/or employee to review the decision. The CPO documents the decision with copies to employee and supervisor.

Original written decision is filed in employee's personnel file.

This step does not apply to employees who have a direct reporting relationship to the CPO. If the employee is dissatisfied with the decision in the First Step, the employee should appeal under the process outlined in the Third Step.

### **2.22.03 Complaint: Third Step**

If the employee is dissatisfied with the CPO decision in the second step, then he/she may appeal to the CEO directly. The employee has five (5) working days after receiving the written decision to file an appeal. The matter is considered closed if a written appeal is not received by the fifth (5th) day.

The CEO reviews the complaint and may choose to meet with both the supervisor and employee together or separately. The CEO must respond in writing, within five (5) working days after receiving the written appeal.

The Third Step is the final appeal process for all grievances.

This step does not apply to employees who have a direct reporting relationship to the CEO. If the employee is dissatisfied with the decision in the Second Step with the CEO, the employee should appeal under the process outlined in the Fourth Step.

### **2.22.04 Complaint: Fourth Step (only for employees who have a direct reporting relationship to the CEO)**

If the employee has a direct reporting relationship to the CEO and is dissatisfied with CEO's decision in the Second Step, then he/she can present his/her case to the Executive Committee of the Board of Directors, in writing within five (5) working days of receiving the written decision from the CEO. Should the employee fail to appeal Bill Wilson Center's CEO's decision within five (5) working days following the date that the CEO rendered a decision, then the CEO's decision will be considered final, and no further appeal from the employee will be considered.

The written appeal to the Executive Committee of the Board of Directors shall include a concise statement of the employee's complaint, the act or condition on which it is based, the course of action that has been

followed in attempting to resolve the matter, and reason that the matter is being appealed. The CEO shall submit to the Executive Committee of the Board of Directors a written response to, and the proposed resolution of the employee's appeal within one week from date that he/she has received the employee's written appeal.

Within one week after receiving required written reports, the Executive Committee of the Board of Directors shall make written recommendations to the CEO for resolving the appeal. The employee shall receive a copy of the recommendations. The CEO may in his/her discretion, choose to follow the recommendations of the Executive Committee of the Board of Directors, but shall notify both the Committee and employee of acceptance or rejection of recommendations within one (1) week. The CEO's decision is final.

## **2.23 Nepotism Policy (Employment of Relatives)**

The employment of relatives can cause various problems including but not limited to charges of favoritism, conflicts of interest, family discord and scheduling conflicts that may work to the disadvantage of both BWC and its employees.

For the purposes of this policy the term "relative" shall include the following relationships: relationships established by blood, marriage or legal action. Examples include the employee's: spouse, mother, father, son, daughter, sister, brother, mother-in-law, father-in-law, sister-in-law, brother-in-law, son-in-law, daughter-in-law, stepparent, stepchild, aunt, uncle, nephew, niece, grandparent, grandson or cousin. The term also includes domestic partners (a person with whom the employee's life is interdependent and who shares a common residence) and, a daughter or son of an employee's domestic partner.

It is the goal of BWC to avoid creating or maintaining circumstances in which the appearance or possibility of favoritism, conflicts or management disruptions exist. BWC may allow existing personal relationships to be maintained or employ individuals with personal relationships to current employees under the following circumstances:

- Individuals may not work under the supervision of the same manager;
- They may not create a supervisor/subordinate relationship with a family member;
- They may not supervise or evaluate a family member;
- The relationship will not create an adverse impact on work productivity or performance;
- The relationship may not create an actual or perceived conflict-of-interest;
- They may not audit or review in any manner the individual's work or academic advancement/professional certification
- They may not be employed if a member of the employee's immediate family (spouse, children, parents, grandparents, brothers, sisters, step family members, in-law family members) serves on the agency's Board or any Committee which has authority to review or order personnel actions or wage and salary adjustments or which could affect his/her job.

No personal employee relationship covered by this policy will be allowed to be maintained, regardless of the positions involved, if it creates a disruption or potential disruption in the work environment, creates an actual or perceived conflict of interest or is prohibited by any legal or regulatory mandate.

No employee shall become a member of the Board of Directors for a period of twelve (12) months from the separation of his/her BWC employment. No member of the Board of Directors shall be employed by Bill Wilson Center unless they resign from the Board of Directors.

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This policy must be considered when hiring, promoting or transferring any employee.

Should relationships addressed within this policy be identified with either candidate for employment or, current employees the matter should be immediately reported to the CEO or designee and the following policies and procedures will be followed:

- A determination will be made whether the relationship is subject to the agency's employment of relative's policy based on the conditions described above.
- If the relationship is determined to fall within one or more of the conditions described in this policy the CAO in consultation with the affected employees and the Chief Program Officer will attempt to resolve the situation through the transfer of one employee to a new position or identifying some other action (e.g., Supervisory reassignment) which will correct the conflict or issue identified. If accommodations are not feasible, the CEO shall determine which employee must resign in order to resolve the situation.

BWC reserves the right to exercise appropriate managerial judgment to take such actions as may be necessary to achieve this intent of this policy. BWC reserves the right to vary from the guidelines outlined in this policy to address unusual circumstances on a case by case basis.

It is the responsibility of every employee to identify to the CEO any potential or existing personal relationship which falls under the definitions provided in this policy. Employees who fail to disclose personal relationships covered by this policy will be subject to disciplinary action up to and including the termination of employment.

## 2.24 Reductions in Force

Under some circumstances, Bill Wilson Center may need to restructure or reduce its workforce. If restructuring our operations or reducing the number of employees becomes necessary, Bill Wilson Center will attempt to provide advance notice, if possible, to help prepare affected individuals. If possible, employees subject to layoff will be informed of the nature of the layoff and the foreseeable duration of the layoff, whether short-term or indefinite.

In determining which employees will be subject to layoff, Bill Wilson Center will take into account, among other things, operation and requirements, the skill, productivity, ability, and past performance of those involved, and also, when feasible, the employee's length of service.

### 2.24.01 Recall After Layoff

Call backs from reduction in force will be conducted when, and if, new funding is received to permit rehire. Job vacancy announcements will be available on the agency website for all present staff members and to those terminated in most recent lay-offs. All of those responding will compete equally for the available position, based on experience, qualifications, seniority, affirmative action and agency needs.

## 2.25 Involuntary Termination and Discipline

*NOTE: Nothing in this policy changes the basic at-will nature of your employment.*

Violation of Bill Wilson Center policies and rules as well as licensing or regulatory rules at programs or committing fraud may warrant disciplinary action. Bill Wilson Center has established a system of discipline that includes verbal warnings, written warnings, and suspension. **The system is not formal and Bill Wilson Center may, in its sole discretion, utilize whatever form of discipline is deemed appropriate under the circumstances, up to, and including, termination of at-will employment.**

### **2.25.01 Disciplinary Actions and Dismissal**

The following are the forms of disciplinary actions, which supervisors may utilize (all disciplinary action is documented and placed in employee's personnel file). **The supervisor is not required to follow each or any step in this process.**

### **2.25.02 Warnings and Penalties**

Commission of a minor infraction may result in the following penalties, although in any particular case the penalty may be greater:

1. FIRST OFFENSE – oral or written first warning notice;
2. SECOND OFFENSE (of any nature) – written second warning notice or written final warning notice;
3. THIRD OFFENSE (of any nature) – written final warning, suspension or discharge;
4. FOURTH OFFENSE (of any nature) – suspension or discharge.

Commission of a major infraction may result in the following penalties, although in any particular case the penalty may be greater:

1. FIRST OFFENSE - written final warning notice, suspension, discharge, or placed on probation;
2. SECOND OFFENSE - suspension or discharge.

### **2.25.03 Disciplinary Action: Probation**

An employee may be placed on disciplinary probation when the situation is serious enough to warrant such action (e.g., when there is still no improvement or a major infraction occurs). Probation must be approved by the CEO or designee and may last up to nine months. If the probation period is for more than 90 days, the HR Manager will receive quarterly progress reports from the supervisor on the employee.

The supervisor reviews, signs, and dates the terms of probation. The employee signs a statement that he/she has received a copy of the terms of probation. If the employee refuses to sign the statement, then a witness may sign stating that he/she has witnessed that the employee was read the terms of probation by the supervisor.

During the probationary period, the supervisor meets regularly with the employee to review his/her performance. At the end of the probationary period, the supervisor reviews the employee's performance. If the employee is to be reinstated to regular employment status, the supervisor completes a written report. He/she signs the report and forwards it to the HR Department and CEO for review and approval. If the CEO approves the reinstatement, the supervisor notifies the employee. An employee may be terminated at any point during the period of probation if insufficient progress is being made towards meeting the terms of the probation.

### **2.25.04 Disciplinary Action: Suspension**

An employee may be suspended without pay for major violations or repeated minor violation.

In all cases, the suspension cannot be less than one (1) calendar day nor greater than twenty-nine (29) calendar days. Exempt employees will be suspended only in full workweek increments.

Suspended employees are not entitled to any wages or benefit accrual during periods of suspension. This does not apply to wages already earned. Suspended employees may not use accumulated PTO, or other benefits to compensate them for wages lost during periods of suspension. Copies of all documentation of a suspension are maintained in the employee's personnel file.

An employee may be suspended with pay for up to five (5) days. The CEO must approve all suspensions.

#### **2.25.05 Disciplinary Action: Dismissal**

Employees are subject to dismissal for actions deemed to be sufficiently serious, or continued failure to respond appropriately to prior corrective action, or if such action is deemed in the best interest of the Bill Wilson Center.

Copies of all documentation of a dismissal are maintained in the employee's personnel file.

### **2.26 Voluntary Termination**

Voluntary termination results when an employee voluntarily resigns his or her employment at Bill Wilson Center, or fails to report to work for three consecutively scheduled workdays without notice to, or approval by, his or her supervisor. All Center-owned property, including vehicles, keys, uniforms, identification badges, and credit cards, must be returned immediately upon termination of employment. Employees who are resigning should complete a resignation letter including reason and last day of work and submit to their supervisor as soon as possible. **For proper client care and cross training, BWC requests a 3 week notice of resignation (minimum) from direct service staff and a 4 week notice of resignation (minimum) from management staff.**

### **2.27 Final Wages**

Upon separation, a regular employee receives payment for all unused accrued PTO at the employee's regular rate of pay. Upon the death of an employee, the estate of the employee is paid for all of the employee's accrued, unused PTO, and any wage/salary which was due the employee. An employee who is discharged will be paid at the time of discharge. Employees who accrue holiday pay due to work in a 24x7 program will also be paid out those holiday hours accrued at time of discharge (or the estate of an employee who has died if applicable). There is no payout of accrued sick time.

An employee who has notified Bill Wilson Center of intent to resign with more than 72 hours' notice will be paid in full on his/her final day of work. An employee who quits with fewer than 72 hours' notice shall be paid not later than 72 hours after notice is given. An employee who gives fewer than 72 hours' notice is entitled to receive his/her final wage payment by mail if he/she so requests and designates a mailing address. The date of mailing is considered the date of payment for purposes of the 72-hour requirement.

### **2.28 Rehire Policy**

Former employees who left BWC in good standing may be considered for reemployment and can apply for open positions and compete equally with other applicants. Former employees who resigned without written notice or who were dismissed for certain disciplinary reasons may not be considered for reemployment.

A former employee who is reemployed will be considered a new employee from the date of reemployment. If a former employee was laid-off due to a reduction in force and they are reemployed within 6 months, these employees will retain previously accumulated seniority.

All former employees who are reemployed will be considered new hires when determining benefits eligibility (except for retirement benefits in certain cases).

Employees who retire may be eligible, in certain circumstances, to be considered for rehire.

## **Standards of Conduct**

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### **3.01 Prohibited Conduct**

The following conduct is prohibited and will not be tolerated by Bill Wilson Center. This list of prohibited conduct is illustrative only; other types of conduct that threaten security, personal safety, employee welfare and Bill Wilson Center operations also may be prohibited. Prohibited conduct will lead to corrective action up to and including termination of employment.

- Falsifying employment records, employment information, or other Bill Wilson Center records;
- Recording the work time of another employee or allowing any other employee to record your work time, or falsifying any time card, either your own or another employee's;
- Violation of the privacy of a client or staff member by disclosing confidential information about him/her to unauthorized persons or any HIPAA regulations;
- Theft and deliberate or careless damage or destruction of any Bill Wilson Center property, or the property of any employee or client;
- Removing or borrowing Bill Wilson Center property without prior authorization;
- Unauthorized use of Bill Wilson Center equipment, time, materials, or facilities;
- Provoking a fight or fighting during working hours or on Bill Wilson Center property;
- Participating in horseplay or practical jokes on Bill Wilson Center time or on Bill Wilson Center premises;
- Carrying firearms or any other dangerous weapons on Bill Wilson Center premises at any time;
- Reporting to work under the influence of alcohol or drugs;
- Possessing or using unlawful drugs, except for prescribed medication, on Bill Wilson Center premises at any time;
- Engaging in criminal conduct whether or not related to job performance;
- Causing, creating, or participating in a disruption of any kind during working hours on Bill Wilson Center property;
- Insubordination, including but not limited to failure or refusal to obey the orders or instructions of a supervisor or member of management, or the use of abusive or threatening language toward a supervisor or member of management;
- Using abusive language at any time on Bill Wilson Center premises;
- Failing to notify a supervisor when unable to report to work;
- Repeated tardiness;
- Unreported absence from work on scheduled workdays;
- Failing to obtain permission to leave work for any reason during normal working hours;
- Wasting time, loitering or being away from assigned working place for long periods of time without good reason;
- Failing to observe working schedules, including rest and lunch periods;
- Failing to provide a medical certificate when requested or required to do so;
- Failure to return to work at the end of an authorized leave of absence;

- Sleeping or malingering on the job;
- Making or accepting personal telephone calls of more than three minutes in duration during working hours, except in cases of emergency;
- Working overtime without authorization or refusing to work assigned overtime;
- Violating Bill Wilson Center dress code;
- Violating any safety, health, security or Bill Wilson Center policy, rule, or procedure;
- Violation of State Licensing regulations, instructions or guidelines;
- Failing to report an accident or incident;
- Violation of professional ethics or HIPAA including any breach of a duty to a client;
- Inappropriate physical contact with a client, including sexual conduct with a client;
- Engaging in harassment;
- Soliciting or accepting money as gifts in connection with duty;
- Committing a fraudulent act or a breach of trust under any circumstances;
- Committing of or involvement in any act of harassment of another individual;
- Failure to report suspected child abuse
- Violating Bill Wilson Center's no pet policy (service and support animals excluded)

### **3.02 Off-Duty Conduct and Outside Employment**

While Bill Wilson Center does not seek to interfere with the off-duty and personal conduct of its employees, certain types of off-duty conduct may interfere with the Bill Wilson Center's legitimate business interests. For this reason, employees are expected to conduct their personal affairs in a manner that does not adversely affect Bill Wilson Center's or their own integrity, reputation or credibility. Illegal or immoral off-duty conduct by an employee that adversely affects Bill Wilson Center's legitimate business interests or the employee's ability to perform his or her job will not be tolerated.

Employees who participate in BWC programs offered to staff (i.e., housing) or volunteer for other programs or positions (i.e., Volunteer House Monitors) are expected to keep these separate from their BWC employment/worksites. Any issues or misconduct that arises at BWC worksites that relates to the above will be handled through disciplinary action.

While employed by Bill Wilson Center, employees are expected to devote their energies to their jobs with Bill Wilson Center. The following types of employment elsewhere are strictly prohibited:

- Additional employment that conflicts with an employee's work schedule, duties, and responsibilities at Bill Wilson Center;
- Additional employment that creates a conflict of interest or is incompatible with the employee's position with Bill Wilson Center;
- Additional employment that impairs or has a detrimental effect on the employee's work performance with Bill Wilson Center;
- Additional employment that requires the employee to conduct work or related activities on Bill Wilson Center property during the employer's working hours or using Bill Wilson Center facilities and/or equipment; and

- Additional employment that directly or indirectly competes with the business or the interests of Bill Wilson Center.

Employees who wish to engage in additional employment that may create a real or apparent conflict of interest must submit a written request to Bill Wilson Center explaining the details of the additional employment. If the additional employment is authorized, Bill Wilson Center assumes no responsibility for it. Bill Wilson Center shall not provide workers' compensation coverage or any other benefit for injuries occurring from or arising out of additional employment. Authorization to engage in additional employment can be revoked at any time.

### 3.03 Confidentiality

Each employee is responsible for safeguarding the confidential information obtained during employment. In the course of your work, you may have access to confidential information regarding Bill Wilson Center, its clients, associates, or perhaps even fellow employees and the agency's grants and contracts. You have responsibility to prevent revealing or divulging any such information unless it is necessary for you to do so in the performance of your duties. Access to confidential information should be on a "need-to-know" basis and must be authorized by your supervisor. Any breach of this policy will not be tolerated and will result in disciplinary action. Additionally, legal action may be taken by Bill Wilson Center. Such confidential information includes, but is not limited to, the following examples:

- employee information
- contact lists
- special event mailing lists
- donor information or membership lists
- compensation data (excluding your personal information)
- computer processes, programs and codes
- financial information
- Bill Wilson Center written materials or marketing planning
- proprietary production processes
- Intellectual property developed, designed or created under the direction of Bill Wilson Center: including but not limited to research and development strategies, survey data or analysis, pending projects and proposals and position papers
- discussions with key collaborators or partners which are deemed confidential information
- technological data
- client data and information

Bill Wilson Center has a robust HIPAA privacy and security program. **Any questions related to client privacy or security may be directed to Laura Foster at (408) 289-5834.**

Information regarding the client's records, telephone conversations, family histories, mental illness, must never be communicated to anyone other than Bill Wilson Center's professional and paraprofessional personnel, who require such information to treat Bill Wilson Center's clients. Any communication about a Bill Wilson Center client which is requested by an outside person or agency, must have the client's prior written consent and the consent of the patient's legal guardian, except as required by law (i.e., cases of reportable diseases, child abuse, or subpoenas ordered by the court). All such requests must be handled in accordance with approved medical records policies and procedures. Violation of this policy may be cause for immediate suspension or termination.

### **3.04 Drug and Alcohol Abuse**

Bill Wilson Center is concerned about the use of alcohol, marijuana (recreational or medicinal), illegal drugs, or controlled substances as it affects the workplace. Use of these substances, whether on or off the job, can detract from an employee's work performance, efficiency, safety, and health, and therefore seriously impair the employee's value to Bill Wilson Center. In addition, the use or possession of these substances on the job constitutes a potential danger to the welfare and safety of other employees and exposes Bill Wilson Center to the risks of property loss or damage, or injury to other persons.

Furthermore, the use of prescription drugs and/or over-the-counter drugs also may affect an employee's job performance and may seriously impair the employee's ability to work.

The following rules and standards of conduct apply to all employees either on Bill Wilson Center property or during the workday (including meals and rest periods). Behavior that violates Bill Wilson Center policy includes:

- Possession or use of an illegal or controlled substance, or being under the influence of an illegal or controlled substance while on the job;
- Showing up to work under the influence of alcohol or marijuana or drinking alcohol or smoking marijuana during the workday;
- Driving a Bill Wilson Center vehicle (or personal vehicle while on BWC business) while under the influence of alcohol or marijuana; and
- Distribution, sale, or purchase of an illegal or controlled substance while on the job.

Violation of these rules and standards of conduct will not be tolerated. An employee will be sent home without pay if behavior consistent with violation of this policy is exhibited and the employee will be subject to discipline up to and including termination. Bill Wilson Center also may bring the matter to the attention of appropriate law enforcement authorities.

In order to enforce this policy, Bill Wilson Center reserves the right to conduct searches of Bill Wilson Center property or employees and/or their personal property, and to implement other measures necessary to deter and detect abuse of this policy.

An employee's conviction on a charge of illegal sale or possession of any controlled substance while off Bill Wilson Center property will not be tolerated because such conduct, even though off duty, reflects adversely on Bill Wilson Center. In addition, Bill Wilson Center must keep people who sell or possess controlled substances off Bill Wilson Center premises in order to keep the controlled substances themselves off the premises.

Any employee who is using prescription or over-the-counter drugs that may impair the employee's ability to safely perform the job, or affect the safety or well-being of others, must notify a supervisor of such use immediately before starting or resuming work.

Bill Wilson Center will encourage and reasonably accommodate employees with alcohol, marijuana or drug dependencies to seek treatment and/or rehabilitation. Employees desiring such assistance should request a treatment or rehabilitation leave. Bill Wilson Center is not obligated, however, to continue to employ any person whose performance of essential job duties is impaired because of drug or alcohol use, nor is Bill Wilson Center obligated to re-employ any person who has participated in treatment and/or rehabilitation if that person's job performance remains impaired as a result of dependency. Additionally, employees who are given the opportunity to seek treatment and/or rehabilitation, but fail to successfully overcome their dependency or problem, will not automatically be given a second opportunity to seek treatment and/or rehabilitation. This policy on treatment and rehabilitation is not intended to affect the Bill Wilson Center's treatment of employees who violate the regulations described previously. Rather, rehabilitation is an option for an employee who acknowledges

a chemical dependency and voluntarily seeks treatment to end that dependency.

### **3.05 Punctuality and Attendance**

As an employee of Bill Wilson Center, you are expected to be punctual and regular in attendance. Any tardiness or unplanned absence causes problems for your fellow employees and your supervisor. When you are absent, your assigned work must be performed by others.

Employees are expected to report to work as scheduled, on time, and prepared to start work. Employees also are expected to remain at work for their entire work schedule, except for meal periods or when required to leave on authorized business. Late arrival, early departure, or other unanticipated and unapproved absences from scheduled hours are disruptive and must be avoided.

If you are unable to report for work on any particular day, you must under all but the most extenuating circumstances call your supervisor at least one hour before the time you are scheduled to begin working for that day (some overnight or 24/7 programs require call in at least 4 hours prior to shift under all but the most extenuating circumstances). If you call less than one hour before your scheduled time to begin work (or at least 4 hours prior to scheduled shift time for overnight or 24/7 programs) and do not arrive in time for your assigned shift, you will be considered tardy for that day. In all cases of absence or tardiness, employees must provide their supervisor with an honest reason or explanation. Employees also must inform their supervisor of the expected duration of any absence. Excessive absenteeism or tardiness will not be tolerated. Bill Wilson Center defines excessive absenteeism as more than three days unexcused absence in a twelve-month period. Excessive tardiness is determined at the Program Manager/Supervisor's discretion. The only excused absence is approved PTO and sick leave. Medical documentation from a doctor stating the employee was unable to work and showing the dates covered must be submitted after 3 days of absence due to illness, however, all absences can be reviewed by managers when determining if an attendance/punctuality issue exists.

If you fail to report for work without any notification to your supervisor and your absence continues for a period of three days, Bill Wilson Center will consider that you have abandoned your employment.

### **3.06 Dress Code and Other Personal Standards**

The intent of this policy is to ensure that all employees report to work properly groomed and wearing appropriate clothing for their position within the agency. Employees are expected to dress neatly and in a manner consistent with the nature of the work performed. Employees who report to work inappropriately dressed, in the judgment of management, may be required to leave the agency and return in acceptable attire. Time taken off work to comply with this policy shall be at the employee's expense.

This policy also applies to interns and regular volunteers.

Acceptable clothing for management or office employees is business casual. Shoes must be worn at all times.

Clothing that is not considered acceptable includes:

- Very short skirts or shorts;
- Light Blue Jeans except on Fridays (dark blue or black jeans are OK for all staff Monday - Thursday); no low cut jeans, torn/ripped jeans, jeans with painted words/language at any time)
- Underwear worn as outerwear - including T-shirts;
- Tank or halter tops (unless covered with sweater or other cover up);

- Low cut tops;
- Bare midriffs;
- Leggings (permitted as tights only under a dress that you could normally wear without leggings) – athletic leggings are never allowed;
- Sweats (permitted ONLY for residential counselors working night shift and weekends);
- Gang-related clothing or bandanna (including not wearing certain colors if working in certain programs/areas);
- Clothing or buttons with sexual, racial, violence-related, political, religious, drug, tobacco or alcohol-related designs;
- Flip flops, open toe mules and slippers (including house slippers, UGGs slippers, etc.);
- Visible body piercing or tattoos. Ear piercing is acceptable; other visible piercings or tattoos may be approved on a case by case basis by supervisors. Tattoos exhibiting gang, porn, inappropriate language, racism, human trafficking, drugs, etc. should never be visible.
- Hair Rollers

All clothing should be clean and without rips or holes. Dressing in gym attire or clothing that looks like gym attire is considered inappropriate (we understand that occasionally staff will be changing into/out of gym clothes during the workday and this is acceptable for short periods of time).

Staff working on their days off when Center is closed may dress casually. In addition, staff taking youth out for recreation may dress appropriately for the activity.

Managers are expected to abide by the above policy and monitor their employee's attire for appropriateness.

Any employee representing BWC in the community or meeting with outside agencies or representatives will need to ensure they are dressed appropriately and professionally (may include not being able to wear jeans to that meeting for example).

### **3.07 Conduct Standards and Boundaries with Clients**

Bill Wilson Center is committed to having its employees and volunteers maintain healthy, unambiguous boundaries in order to provide safe, professional services. Professional boundaries are the limits staff set on their working relationships. They allow for safe and healthy relationships between those offering services (staff, volunteers, interns for example) and those receiving them (generally our clients). They are separate from other relationships, such as social, familial, sexual and business (including financial). All direct-service staff members, interns and volunteers are required to complete the "Boundaries" training module in Relias.

These guidelines are consistent with trauma-informed care and are intended to provide clear expectations on how staff should conduct themselves, when providing direct services to clients. (Also see: The Employee Handbook: sections 3.01 Prohibited Conduct, and Policies and Procedures: ETH 5.01, 5.02, 5.03 Ethics and Professional; Statement of Client Rights & Responsibilities).

#### **BOUNDARY VIOLATIONS**

Boundary violations are boundary crossings that are considered inappropriate or unethical.

Boundary violations can be dangerous to clients or staff, especially as many of our clients have experienced trauma, which can be further exasperated by ambiguous relationships or uncomfortable situations with those who provide services.

Boundary violations with clients are strictly prohibited and will result in disciplinary action up to and including termination. Examples of boundary violations include:

- Lending or borrowing money
- Sharing too much personal information
- Sexual advances or failure to properly respond to advances by a client
- Staff/client dating
- Verbal threats
- Disrespectful remarks
- Inappropriate physical contact
- “Friending” of clients on social media
- Providing personal cellphone numbers or home address to clients **(If you wish your clients to be able to reach you by cell phone, either use forwarding or Google Voice)**
- Allowing personal feelings to influence interactions with clients (for example, showing favoritism towards a client or reacting negatively to a client and providing lower quality services)

### **SITUATIONS TO AVOID**

Some situations can be open to misinterpretation or leave staff open to false accusations. These include:

- Touching clients
- Being alone with a client in a bedroom
- Being alone with a client behind a closed door (except in the context of providing therapy)
- Accepting a gift from a client (see BWC policy ETH 3.01, 3.02, 3.03, 3.04, 3.05)
- Giving a gift to a client
- Meeting with clients outside of work hours

### **RESPONDING TO ADVANCES MADE BY CLIENTS**

Many of our clients have been sexually abused or exploited. This can lead to increased sexualized behavior and uncomfortable encounters. Any sexual advance by a client or overly sexualized behavior should immediately be addressed by emphatic limit setting. As soon as possible, document the incident and your response to it. Report it to your manager.

Clients may try to initiate a personal friendship or other relationship beyond that of client/staff, volunteer, intern, etc. If this should occur, set firm limits, emphasizing the nature of your relationship as a service provider and your wish to keep your work and personal lives separate. Document the client’s action and your response.

### **STRATEGIES FOR MAINTAINING HEALTHY BOUNDARIES**

- Help and support clients to the best of your ability and ensure that you do no harm
- Ensure that actions are based on the needs of clients
- Examine your motivations for devoting extra attention to particular clients
- Use supervision and consultation to discuss your relationships with your clients
- Act in a trustworthy and responsible manner in all dealings with clients
- Be truthful and honest in interactions with clients
- Respect clients’ rights as individuals
- Ensure that all current and potential clients have an equal opportunity to access and benefit from your service

### **3.08 News Media Contacts**

Employees may be approached for interviews or comments by the news media. All information provided to the media must be channeled through the CEO, the Chief Community Resources Officer or their designee. All planned public statements must be reviewed by the CEO or his/her designee. If an employee makes a public statement regarding Bill Wilson Center that has not been cleared, the employee must state that he/she is giving a personal opinion. In the event that an employee does not so state, he/she may be subject to suspension or termination.

### **3.09 Solicitation**

To maintain and promote efficient operations, discipline and security, the agency has established rules that govern solicitation, distribution of written material and entry into premises and work areas. Bill Wilson Center prohibits solicitation or promotion during your own or another employee's work time for any cause or organization and prohibits the distribution or circulation of any printed or written material in the work areas at any time. This includes sale of goods, memberships and collection for charitable institutions. The exceptions are those things that directly benefit Bill Wilson Center conducted by Bill Wilson Center employees.

This policy is applicable to all employees, interns, volunteers and visitors of Bill Wilson Center.

Non-employees are prohibited from solicitation or distribution of written materials for any purpose on the agency's premises unless they have received prior approval from the CEO or designee.

The Chief Community Resources Officer or their designee coordinate fundraising campaigns located on Bill Wilson Center premises, including promotion of charitable institutions that directly benefit Bill Wilson Center.

### **3.10 Code of Ethics**

#### The Code of Ethics for Bill Wilson Center

#### **I. Personal and Professional Integrity**

All staff, board members and volunteers of Bill Wilson Center act with honesty, integrity and openness in all their dealings as representatives of Bill Wilson Center. Bill Wilson Center promotes a working environment that values respect, fairness and integrity.

#### **II. Mission**

Bill Wilson Center has a clearly stated mission and purpose, approved by the board of directors, in pursuit of the public good. All of its programs support that mission and all who work for or on behalf of Bill Wilson Center understand and are loyal to that mission and purpose. The mission is responsive to the constituency and communities served by Bill Wilson Center and of value to the society at large.

#### **III. Governance**

Bill Wilson Center has an active governing body that is responsible for setting the mission and strategic direction of Bill Wilson Center and oversight of the finances, operations, and policies of Bill Wilson Center. The governing body:

- Ensures that its board members or trustees have the requisite skills and experience to carry out their duties and that all members understand and fulfill their governance duties acting for the benefit of Bill Wilson Center and its public purpose;

- Has a conflict of interest policy that ensures that any conflicts of interest or the appearance thereof are avoided or appropriately managed through disclosure, recusal or other means; and
- Is responsible for the hiring, firing, and regular review of the performance of the chief executive officer, and ensures that the compensation of the chief executive officer is reasonable and appropriate;
- Ensures that the CEO and appropriate staff provide the governing body with timely and comprehensive information so that the governing body can effectively carry out its duties;
- Ensures that Bill Wilson Center conducts all transactions and dealings with integrity and honesty;
- Ensures that Bill Wilson Center promotes working relationships with board members, staff, volunteers, and program beneficiaries that are based on mutual respect, fairness and openness;
- Ensures that Bill Wilson Center is fair and inclusive in its hiring and promotion policies and practices for all board, staff and volunteer positions;
- Ensures that policies of Bill Wilson Center are in writing, clearly articulated and officially adopted;
- Ensures that the resources of Bill Wilson Center are responsibly and prudently managed; and,
- Ensures that Bill Wilson Center has the capacity to carry out its programs effectively.

#### **IV. Legal Compliance**

Bill Wilson Center is knowledgeable of and complies with all laws, regulations and applicable international conventions.

#### **V. Responsible Stewardship**

Bill Wilson Center manages their funds responsibly and prudently. This should include the following considerations:

- It spends a reasonable percentage of its annual budget on programs in pursuance of its mission;
- It spends an adequate amount on administrative expenses to ensure effective accounting systems, internal controls, competent staff, and other expenditures critical to professional management;
- Bill Wilson Center compensates staff, and any others who may receive compensation, reasonably and appropriately;
- Bill Wilson Center solicits funds and has reasonable fundraising costs, recognizing the variety of factors that affect fundraising costs;
- Bill Wilson Center does not accumulate operating funds excessively;
- Bill Wilson Center ensures that all spending practices and policies are fair, reasonable and appropriate to fulfill the mission of Bill Wilson Center; and,
- All financial reports are factually accurate and complete in all material respects.

#### **VI. Openness and Disclosure**

Bill Wilson Center provides comprehensive and timely information to the public, the media, and all stakeholders and is responsive in a timely manner to reasonable requests for information. All information about Bill Wilson Center will fully and honestly reflect the policies and practices of Bill Wilson Center. Basic informational data about Bill Wilson Center, such as the Form 990, reviews and compilations, and audited financial statements will be posted on Bill Wilson Center's website or otherwise available to the public. All solicitation materials accurately represent Bill Wilson Center's policies and practices and will reflect the dignity of program beneficiaries. All financial and program reports will be complete and accurate in all material respects.

#### **VII. Program Evaluation**

Bill Wilson Center regularly reviews program effectiveness and has mechanisms to incorporate lessons

learned into future programs. Bill Wilson Center is committed to improving program effectiveness and develops mechanisms to promote learning from its activities and the field. Bill Wilson Center is responsive to changes in its field of activity and is responsive to the needs of its constituencies.

### **VIII. Inclusiveness and Diversity**

Bill Wilson Center has a policy of promoting inclusiveness and its staff, board and volunteers reflect diversity in order to enrich its programmatic effectiveness. Bill Wilson Center takes meaningful steps to promote inclusiveness in its hiring, retention, promotion, board recruitment and constituencies served.

### **IX. Fundraising**

Bill Wilson Center raises funds from the public or from donor institutions are truthful in their solicitation materials. Bill Wilson Center respects the privacy concerns of individual donors and expends funds consistent with donor intent. Bill Wilson Center discloses important and relevant information to potential donors.

In raising funds from the public, Bill Wilson Center will respect the rights of donors, as follows:

- To be informed of the mission of Bill Wilson Center, the way the resources will be used and their capacity to use donations effectively for their intended purposes;
- To be informed of the identity of those serving on the Bill Wilson Center's governing board and to expect the board to exercise prudent judgment in its stewardship responsibilities;
- To have access to Bill Wilson Center's most recent financial reports;
- To be assured their gifts will be used for the purposes for which they were given;
- To receive appropriate acknowledgement and recognition;
- To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by the law;
- To expect that all relationships with individuals representing Bill Wilson Center of interest to the donor will be professional in nature;
- To be informed whether those seeking donations are volunteers, employees of the Bill Wilson Center or hired solicitors;
- To have the opportunity for their names to be deleted from mailing lists that Bill Wilson Center may intend to share; and,
- To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

### **X. HUD 24 CFR Part 84.42 and 24 CFR Part 583.330(e)**

Our Housing and Urban Development Grants require that we abide by the following:

- Prohibit the solicitation and acceptance of gifts or gratuities by officers, employees and agents for their personal benefit in excess of minimal value.
- Violation of Bill Wilson Center Code of Ethics will reviewed by the Board President or assigned designee(s) regarding any action by board members. The CEO or assigned designee(s) will review any action by employees.
- Remedies for violation of Bill Wilson Center Code of Ethics can be in the form of oral and/or written warnings up to and including censure and removal from the Board and termination of employment for employees.

- All officers' employees and agents of Bill Wilson Center will receive and agree to comply with Bill Wilson Center Code of Ethics upon becoming a member of the Board and/or employee of Bill Wilson Center.
- No employee, agent, consultant, officer, or elected or appointed official of Bill Wilson Center and who exercises or has exercised any functions or responsibilities with respect to assisted activities, or who is in a position to participate in a decision making process or gain inside information with regard to such activities may obtain a personal or financial interest or benefit from the activity or have an interest in any contract, subcontract, or agreement with respect thereof, or the proceeds thereunder, either for himself or herself or for those with whom he or she has business ties, during his or her tenure or for one year thereafter.

## **XI. Gifts**

No employee shall accept or receive any benefit from any gift, gratuity, present, property, or service of any kind or nature regardless of value, which may be directly or indirectly offered as a result of, or in anticipation of, an employee's position or performance of duties with Bill Wilson Center.

Exceptions include:

- Unsolicited advertising or promotional materials of nominal intrinsic value such as pens and calendars.
- Unsolicited consumable items that are donated to an entire work group and are consumed on the premises.
- Nominal gifts accepted on behalf of the agency from clients such as flowers, cookies, etc.

If you are personally offered a gift, gratuity, present, discount, or service of any kind, please inform them that Bill Wilson Center staff are not permitted to accept any such item personally, but would be happy to include the item/service in a gift pool for employees and/or clients. Additionally, employees may not solicit gifts, discounts, services, or favors for their personal use. Any gifts received that should go to the employee or client gift pool must be turned in immediately to the Director of Finance.

### **3.11 Conflict of Interest**

This Conflict of Interest Policy is designed to help directors, officers and employees of Bill Wilson Center identify situations that present potential conflicts of interest and to provide Bill Wilson Center with a procedure which will allow a transaction to be treated as valid and binding even though a director, officer or employee has or may have a conflict of interest with respect to the transaction. Conflict of Interest arises whenever the personal or professional interest of a responsible person is potentially at odds with the best interest of Bill Wilson Center. A responsible person can be an officer, employee, member of the board of directors or family member. Members of the Board of Directors are prohibited from volunteering for Bill Wilson Center programs.

1. Conflict of Interest Defined. For the purpose of this policy, the following circumstances shall be deemed to create Conflict of Interest:

- A. A "Material Financial Interest" in an entity, which is substantial enough that it would affect a responsible person's judgment with respect to a contract or transaction. A "Contract or Transaction" is any agreement or relationship involving the sale or purchase of goods or services, the providing or receipt of a loan or grant, the establishment of any other type of pecuniary relationship. The making of a gift to Bill Wilson Center is not a contract or transaction.

## 2. Procedures.

- A. Prior to board or committee action on a contract or transaction involving a conflict of interest, a director or committee member having a conflict of interest and who is in attendance at the meeting shall disclose all facts material to the conflict of interest. Such disclosure shall be reflected in the minutes of the meeting.
- B. A director or committee member who plans not to attend a meeting at which he or she has reason to believe that the board or committee will act on a matter in which the person has a conflict of interest shall disclose to the chair of the meeting all facts material to the conflict of interest. The chair shall report the disclosure at the meeting and the disclosure shall be reflected in the minutes of the meeting.
- C. A person who has a conflict of interest shall not participate in or be permitted to hear the board or committee discussion of the matter except to disclose material facts and to respond to questions. Such person shall not attempt to exert his or her personal influence with respect to the matter, either at or outside the meeting.
- D. A person who has a conflict of interest with respect to a contract or transaction that will be voted on at a meeting shall not be counted in determining the presence of a quorum for purposes of the vote. The person having a conflict of interest may not vote on the contract or transaction and shall not be present in the meeting room when the vote is taken, unless the vote is by secret ballot. Such person's ineligibility to vote shall be reflected in the minutes of the meeting.
- E. Responsible persons who are not members of the Board of Directors of Bill Wilson Center, or who have a conflict of interest with respect to a contract or transaction that is not the subject of board or committee action, shall disclose to the chair or chair's designee any conflict of interest that such responsible person has with respect to a contract or transaction. Such disclosure shall be made as soon as the conflict of interest is known to the responsible person. The responsible person shall refrain from any action that may affect Bill Wilson Center's participation in such contract or transaction.

In the event it is not entirely clear that a conflict of interest exists, the individual with the potential conflict shall disclose the circumstances to the chair or the chair's designee, who shall determine whether there exists a conflict of interest that is subject to this policy.

3. Findings of the Board. If the Board of Directors determines that a responsible person has a conflict of interest with regard to a contract or transaction, Bill Wilson Center may engage in the transaction with the responsible person only if the following conditions are met prior to the contract or transaction.

- A. The responsible person shall disclose to the Board all material facts concerning the affiliation and the material economic interest.
- B. The Board shall review the material facts. The contract or transaction may be approved only if a majority of the Board, not counting the vote of any director who is an affiliated person to this contract or transaction, concludes that:
  - (i) The proposed contract or transaction is fair and reasonable to Bill Wilson Center;
  - (ii) Bill Wilson Center proposes to engage in this contract or transaction for its own purposes and benefits and not for the benefit of the responsible person; and

- (iii) The proposed contract or transaction is the most beneficial arrangement which Bill Wilson Center could obtain in the circumstances with reasonable efforts.

Action taken shall be reflected in the minutes of the meeting.

4. Confidentiality. Each responsible person shall exercise care not to disclose confidential information acquired in connection with such status or information the disclosure of which might be adverse to the interest of Bill Wilson Center. Furthermore, a responsible person shall not disclose or use information relating to the business of Bill Wilson Center for the personal profit or advantage of the responsible person or a family member.

5. Remedy. Any responsible person who fails to comply with this conflict of interest policy may, in the discretion of the Board of Directors, be censured or be removed from the Board. If the CEO fails to comply with this conflict of interest policy, he or she may be put on notice or terminated, at the discretion of the Board of Directors. Any employee who fails to comply with this conflict of interest policy may be put on notice or terminated, at the discretion of the CEO.

6. Review of Policy.

- A. Each new responsible person shall be required to review a copy of this policy and to acknowledge in writing that he or she has done so.
- B. Each responsible person shall annually complete a disclosure form identifying any relationships, positions or circumstances in which the responsible person is involved that he or she believes could contribute to a conflict of interest arising. Such relationships, positions or circumstances might include service as a director of or consultant to a nonprofit organization, or ownership of a business that might provide goods or services to Bill Wilson Center. Any such information regarding business interest of a responsible person or a family member shall be treated as confidential and shall generally be made available only to the chair, CEO and any committee appointed to address conflicts of interest, except to the extent additional disclosure is necessary in connection with the implementation of this policy.
- C. This policy shall be reviewed annually by each member of the Board of Directors. Any changes to the policy shall be communicated to all responsible persons.

### **3.12 Whistleblower Policy**

#### **Introduction**

The Code of Ethics and Conflict of Interest policies adopted by Bill Wilson Center requires all staff, board members and volunteers to observe high standards of business and ethics in the conduct of their duties and responsibilities. As employees and representatives of Bill Wilson Center, we must practice honesty and integrity in fulfilling our responsibilities and comply with all laws and regulations. Set forth below is Bill Wilson Center's policy with respect to reporting good faith concerns about the legality or propriety of Bill Wilson Center actions or plans.

#### **Reporting of Concerns or Complaints**

It is the responsibility of all staff, board members and volunteers to comply with Bill Wilson Center's Code of Ethics and Conflict of Interest Policies and applicable law and to report violations or suspected violations in accordance with this Whistleblower Policy.

### **Confidentiality**

Bill Wilson Center will treat all communications under this Policy in a confidential manner, except to the extent necessary (1) to conduct a complete and fair investigation, or (2) for review of Bill Wilson Center operations by the Board of Directors, its Audit Committee, Bill Wilson Center's independent public auditors and Bill Wilson Center's legal counsel.

### **Retaliation**

Bill Wilson Center will not permit any negative or adverse actions to be taken against any employee or individual for making a good faith report of a possible violation of its Code of Ethics, Conflict of Interest or applicable law, even if the report is mistaken, or against any employee or individual who assists in the investigation of a reported violation. Retaliation in any form will not be tolerated. This policy extends to an employee who is a family member of a person engaged in, or perceived to engage in, protected conduct or who makes a complaint protected by the Labor Code. Any act of alleged retaliation should be reported immediately and will be promptly investigated. An employee who retaliates against someone who has reported a violation in good faith is subject to discipline up to and including termination of employment. This Whistleblower Policy is intended to encourage and enable employees and others to raise serious concerns within Bill Wilson Center prior to seeking resolution outside the organization.

### **How to Report Concerns or Complaints**

Employees and others may communicate suspected violations of its Code of Ethics, Conflict of Interest or applicable law or other wrongdoing or alleged retaliation by contacting the Chief Operating Officer. Members of the Board should contact the Board Chair. **This can be done directly by contacting one of these individuals or by calling our Reporting System at any time. The Reporting System number is (408) 648-4682. Your reporting can be anonymous but will mean we will not be able to get back to you directly about our findings.**

**Concerns related to HIPAA privacy or security may be addressed to Laura Foster: (408) 289-5834.**

### **Illustrative Types of Concerns**

The following is a list of the kinds of improprieties that should be reported. It is not intended to be all inclusive. Do report other issues if you feel it appropriate.

- Supplying false or misleading information on Bill Wilson Center's financial or other public documents;
- Providing false information to or withholding material from Bill Wilson Center's board of directors or auditors;
- Destroying, altering, mutilating, concealing, covering up, falsifying, or making false entry in any records that may be connected to an official proceeding, in violation of federal or state law or regulations;
- Altering, destroying or concealing a document, or attempting to do so, with the intent to impair the document's availability for use in an official proceeding or otherwise obstructing, influencing or impeding any official proceeding, in violation of federal or state law or regulations;
- Embezzlement, self-dealing, private dealings (i.e. Bill Wilson Center's earnings for the benefit of an individual) and private benefit (i.e. Bill Wilson Center's assets being used for personal gain or benefit);
- Payment for services or goods that are not rendered or delivered.
- Falsification of records or statements includes (without limitation) an act of misrepresentation, falsification or omission of any fact, whether written or verbal. Records covered by this policy include

(without limitation):

- Medical records
- Client and/or case records
- Personnel records
- Time and attendance records
- Employment application and related documents
- Financial Records or Statements
- Asset tracking systems

## **Operational Considerations**

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## **4.01 Employer Property**

Lockers, desks, computers and agency vehicles are Bill Wilson Center property and must be maintained according to agency rules and regulations. They must be kept clean and are to be used only for work-related purposes. Bill Wilson Center reserves the right to inspect all Bill Wilson Center property to ensure compliance with its rules and regulations, without notice to the employee and at any time, not necessarily in the employee's presence.

Company voice mail and/or electronic mail (e-mail) are to be used for business purposes only. Bill Wilson Center reserves the right to monitor voice mail messages and e-mail messages to ensure compliance with this rule, without notice to the employee and at any time, not necessarily in the employee's presence.

No personal locks may be used on agency-provided lockers unless the employee furnishes a copy of the key or the combination to the lock. Unauthorized use of a personal lock by an employee may result in losing the right to use an agency locker.

Bill Wilson Center may periodically need to assign and/or change "passwords" and personal codes for voice mail, e-mail and computers. These communication technologies and related storage media and databases are to be used only for Bill Wilson Center business and they remain the property of Bill Wilson Center. Bill Wilson Center reserves the right to keep a record of all passwords and codes used and/or may be able to override any such password system.

All records and materials pertaining to Bill Wilson Center remain, at all times, the exclusive property of the agency and not of the staff person. Such records and materials may never be removed from Bill Wilson Center premises without explicit approval.

When an employee, intern, volunteer or contractor leaves Bill Wilson Center, information such as client information, policies and procedures, policy development or analysis, gained on the job may not be taken from the agency without the express and written permission from the CEO or designee.

Purchases of electronic appliances and devices will be completed by Finance and delivered to the manager who placed the order AFTER the item has been asset tagged and inventoried.

Bill Wilson Center retains the ownership of any materials written or developed while working under the direction of Bill Wilson Center.

Prior authorization must be obtained before any agency property may be removed from the premises.

For security reasons, employees should not leave personal belongings of value in the workplace. Personal items are subject to inspection and search, with or without notice, with or without the employee's prior consent. Personal items should be labeled. Bill Wilson Center is not responsible for loss or damage of employees' personal property.

Terminated employees should remove any personal items at the time they leave Bill Wilson Center. Personal items left in the workplace are subject to disposal if not claimed at the time of an employee's termination.

## **4.02 Use of Electronic Media and HIPAA Security**

Bill Wilson Center uses various forms of electronic communication including, but not limited to computers, e-mail, telephones, Internet and Social Media. All electronic communications, including all software, databases, hardware, and digital files, remain the sole property of Bill Wilson Center and are to be used only for agency business and not for any personal use. None of the policies in this Employee Handbook should be interpreted or applied to interfere with the protected rights of employees to discuss or share

information related to their wages, benefits, and terms of employment amongst themselves or with outside parties.

Electronic communication and media may not be used in any manner that would be discriminatory, harassing, or obscene, or for any other purpose that is illegal, against Bill Wilson Center policy, or not in the best interest of the agency.

Employees who misuse electronic communications and engage in defamation, copyright or trademark infringement, misappropriation of trade secrets, discrimination, harassment, or related actions will be subject to discipline and/or immediate termination.

Only authorized employees may post on Bill Wilson Center's Social Media sites. These employees must have approval from the CEO or Chief Community Resources Officer before posting any information about Bill Wilson Center on Social Media sites. Employees may access their personal Social Media sites during non-work hours only.

Employees may not install personal software on Bill Wilson Center computer systems.

All electronic information created by any employee using any means of electronic communication is the property of Bill Wilson Center and remains the property of Bill Wilson Center. This also includes contact lists residing on Bill Wilson Center property. Personal passwords may be used for purposes of security, but the use of a personal password does not affect the agency's ownership of the electronic information.

Bill Wilson Center will override all personal passwords if necessary for any reason.

Bill Wilson Center reserves the right to access and review electronic files, messages, mail, and other digital archives, and to monitor the use of electronic communications as necessary to ensure that no misuse or violation of agency policy or any law occurs.

Employees are not permitted to access the electronic communications of other employees or third parties unless directed to do so by Bill Wilson Center management.

No employee may install or use anonymous e-mail transmission programs or encryption of e-mail communications, except as specifically authorized by the CEO.

Employees who use devices on which information may be received and/or stored, including but not limited to cell phones, cordless phones, portable computers, fax machines, and voice mail communications are required to use these methods in strict compliance with the trade secrets and confidential communication policy established by Bill Wilson Center. These communications tools should not be used for communicating confidential or sensitive information or any trade secrets. Employees who misuse client or other employee personal information will be subject to corrective action up to and including termination of employment.

Access to the Internet, websites, Social Media websites and other types of agency-paid computer access are to be used for agency-related business only. Any information about Bill Wilson Center, its products, grants, contracts, services, or other types of information that will appear in the electronic media about the Center must be approved by the CEO before the information is placed on an electronic information resource that is accessible to others.

Employees are prohibited from using their personal cell phones and personal computers to access AWARDS Electronic health record system. AWARDS should only be accessed using a BWC computer or laptop. If using a laptop offsite, you can request the use of a "Hot Spot" for internet connection when you are offsite and this "hot spot" is to be used ONLY for BWC laptop computers. Employees who violate this policy will be subject to discipline, up to and including termination of employment.

Questions about access to electronic communications or issues relating to security should be addressed to Laura Foster (408) 289-5834.

## **HIPAA Security**

Because Bill Wilson Center uses electronic systems to transmit, receive and store electronic Protected Health Information (ePHI) it is subject to the Health Insurance Privacy and Accountability Act (HIPAA), the Health Information Technology for Economic and Clinical Health (HITECH) Act, and other legal mandates, which require that we have strong protections in place to ensure the security of systems and data. As a result, we have created a Security Plan and a Remote Access Policy. These are posted on the employee portal of the Bill Wilson Website. Employees must comply with the provisions of the Security Plan, and all related policies and procedures, and should be alert to any risks that compromise the security of systems or data. Any potential risks or breaches must immediately be reported to Laura Foster (408) 289-5834.

### **4.03 Health and Safety**

All employees are responsible for their own safety, as well as that of others in the workplace. To help us maintain a safe workplace, everyone must be safety-conscious at all times. Employees must report all work-related injuries or illnesses immediately to their supervisor and the CEO or designee or designee. In compliance with California law, and to promote the concept of a safe workplace, Bill Wilson Center maintains an Injury and Illness Prevention Program. The Injury and Illness Prevention Program is available for review by employees and/or employee representatives on the Staff Portal.

In compliance with Proposition 65, Bill Wilson Center will inform employees of any known exposure to a chemical known to cause cancer or reproductive toxicity.

### **4.04 Safety/Security/Workplace Violence/Disaster Plan**

Bill Wilson Center has developed guidelines to help maintain a secure workplace. Be aware of persons loitering in parking areas, walkways, entrances and exits, and service areas - report any suspicious persons or activities to management. Secure your desk or office at the end of the day. When called away from your work area for an extended length of time, do not leave valuable and/or personal articles in or around your workstation that may be accessible. The security of facilities as well as the welfare of our employees depends upon the alertness and sensitivity of every individual to potential security risks. You should immediately notify your supervisor when unknown persons are acting in a suspicious manner in or around the facilities, or when keys, security passes, or identification badges are missing. **Employees must wear their BWC identification badge at all times that they are on duty.**

#### **4.04.1 Safety Program/IIPP**

BWC's safety program is described in detail in the Illness and Injury Prevention Program (IIPP). All new hires receive a copy of the IIPP and review it during new hire orientation. The IIPP is posted on the Staff Portal.

The Safety Committee meets monthly and includes members of all programs and departments. Memberships in the committee rotate depending on the project being discussed or worked on.

#### **4.04.2 Disaster Plan**

BWC maintains updated Disaster Plans at each program/department office. New hires receive a copy of the agency Disaster Plan and review it with their supervisors at orientation. **The Disaster Plan is also posted on the Staff Portal and located at each work site in a RED safety binder.**

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## 4.05 Health Certification Requirements for Employment

### Employees, Volunteers and Interns of Licensed Programs

All new employees at the Safety Net Shelter and THPP a pre-employment physical and TB screen. **The physical and TB test must be performed by or under the supervision of a physician not more than 3 months prior to employment and for licensed programs must be reported on LIC 503 form.**

A Bill Wilson Center identified health care provider will perform the physical and TB test. New and/or current employees can obtain the pre-employment physical and TB test (still meeting the criteria listed below) through a non-Bill Wilson Center provider at their own expense. If a new or current employee uses their own physician, they must have their physician complete the State of California Health Screening report LIC 503 form.

A health screening report signed by the person performing such screening shall be made on each appropriate new employee, and shall indicate the following:

- A. The person's physical qualifications to perform the duties to be assigned.
- B. The presence of any health condition that would create a health hazard to the person, clients, or other employees.
- C. That the person is free from communicable disease.

The requirements for volunteers and interns are as follows:

The good physical health of each volunteer and intern who works in the Crisis Residential Shelter, Quetzal House, THPP, THP+ Foster Care and Foster Care and Adoption Services shall be verified by:

- A. A statement signed by each volunteer affirming that he/she is in good health. Exception is when the volunteer or intern is used in providing direct care and supervision of clients in these programs - in this situation the volunteer must undergo a physician examination.
- B. A TB test for tuberculosis performed not more than **3 months** prior to initial presence in the licensed facility.

### Employees, Interns and Volunteers of All Other Bill Wilson Center Programs

All program employees and interns will be required to present a TB test for tuberculosis performed not more than 3 months prior to initial hire or have one completed within 7 days of hire. Volunteer TB test requirements will be reviewed on a case by case basis based on the activity that will be performed. Volunteers who provide direct client care (i.e., counseling volunteers) will be required to present a TB test for tuberculosis performed not more than 3 months prior to initial hire or have one completed within 7 days of beginning volunteer assignment. A Bill Wilson Center identified health care provider will perform the TB test.

### Administrative Staff

Administrative staff is exempt from the TB test requirement; **however, full time front desk staff at main office or satellite offices are required to have a TB test.**

### **Re-Test Requirements**

All employees, interns and volunteers who are required to have a TB test, may be required to provide a re-test every 4 years. Certain programs (i.e., licensed programs, etc.) may require an ANNUAL TB test on file. Employees are responsible for keeping track of their due dates and provide HR with updated TB test when due.

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

Smoking is prohibited on all BWC premises in order to provide and maintain a safe and healthy work environment for all employees. The law defines smoking as the "act of lighting, smoking or carrying a lighted or smoldering cigar, cigarette or pipe of any kind." This includes e-cigarettes, vaporizers, marijuana (medicinal or recreational), etc.

The Smoke-Free Workplace policy applies to:

- All areas of buildings occupied by agency employees or clients
- All company-sponsored off-site gatherings and meetings.
- All vehicles owned or leased by the agency.
- All visitors (customers and vendors) to agency premises.
- All contractors and consultants and/or their employees working on agency premises.
- All temporary employees.
- All volunteers and interns.
- All clients housed in BWC properties

BWC client properties will provide designated cigarette smoking area OUTSIDE each house with proper receptacles and clean up instructions for clients. Staff are never allowed to smoke on any BWC property at any time.

### **4.07 Employees Who Are Required to Drive**

It is the policy of the Bill Wilson Center to define guidelines regarding use of vehicles on the job to assure compliance with applicable laws and promote safety of employees, clients, volunteers, and the public.

1. Employees and volunteers who will be involved in the operation of a vehicle are required to demonstrate safe driving skills and meet applicable legal requirements to operate a vehicle on company business. To achieve these requirements, employees and volunteers must meet the following conditions of employment and volunteer status:
  - a. Employees whose positions require driving must have access to a personal vehicle that can be used for company business.
  - b. Employees and volunteers must possess (or obtain by start of employment) and maintain a current valid California driver's license appropriate for the vehicle to be operated on the job.
  - c. Employees and volunteers must provide current evidence of liability auto insurance meeting current liability standards set by state law and provide updated renewal proof each renewal period.
  - d. Bill Wilson Center will obtain a copy of the individual's driving record through the DMV. The driving record must be acceptable to Bill Wilson Center and our automobile insurance carrier. Bill Wilson Center will also receive subsequent reports of driving record violations and may issue corrective action up to and including transfer to a different program or termination of employment if they interfere with employee's ability to drive for BWC.

2. An individual's failure to comply with the above requirements is sufficient grounds to deny or withdraw an offer of employment or volunteer status.
3. Each department/program manager is responsible for designating qualified drivers. Only qualified and designated drivers may operate a company vehicle and/or transport clients. Based on individual driving records through DMV Pull and approval by BWC's insurance carrier employees may be designated to drive on behalf of the agency. Until identified to do so, no employee should transport clients in or run BWC related errands in their personal vehicle.
4. All drivers are responsible for the safe operation of their vehicle as well as company vehicles in compliance with the applicable traffic laws. Drivers shall:
  - a. Observe traffic laws;
  - b. Follow safe operating procedures;
  - c. Perform visual safety check of vehicle before operating vehicle;
  - d. Make sure that company-owned vehicles are equipped with first aid kit, fire extinguisher, emergency light and vehicle manual;
  - e. Be sure all occupants are wearing their safety seat belts.
5. There will be no eating, drinking or smoking in company vehicles or while transporting clients in personal vehicles.
6. In no event shall the driver talk on a cell phone, text message or operate any other electronic equipment while driving the vehicle. It is always preferred that the driver park the car in a safe location to receive or make cell phone calls.
7. The driver and all passengers must wear seat belts at all times. No vehicle should be operated when the number of occupants exceeds the number of passenger restraints available.
8. All drivers are responsible for paying any traffic or parking citations incurred while on the job.
9. Operation of a vehicle on the job with a suspended or revoked driver's license, or a conviction for driving under the influence of alcohol or drugs is sufficient grounds for dismissal.
10. If a position requires driving and the employee is no longer able to drive due to reasons such as those listed above, there may be cause for action, up to and including termination.

### **Additional policies and procedures for BWC-Owned Vehicles:**

1. The drivers of company vehicles must reserve and check out vehicles and ensure the vehicle manual is in the vehicle. Mileage forms and inspection forms must be completed after each trip. All fuel credit card receipts must be obtained and filed in the vehicle manual.
2. BWC vehicles are not to be used to transport only one client. Individuals are to use their own personal vehicles in these cases. An exception would be in an emergency situation.
3. Drivers are to complete a pre-trip inspection prior to taking a vehicle out.
4. Drivers are expected to keep company vehicles clean, and to report any malfunction or damage to their supervisor and Facilities Manager immediately.
5. No alteration of BWC vehicles is permitted. Examples include stereos, amplifiers, radar detectors, trailer hitches, window tinting.
6. Drivers shall obey all applicable traffic and parking regulations, ordinances, and laws.

- a. Employees who incur parking or other fines in BWC vehicles will be personally responsible for payment of such fines.
  - b. Employees who are issued citations for any offense while using a BWC vehicle must notify their supervisor and Facilities Manager immediately, but in no case later than 24 hours. Failure to provide such notice may be grounds for disciplinary action.
  - c. An employee who is arrested for or charged with a motor vehicle offense for which the punishment includes suspension or revocation of the motor vehicle license while in a BWC vehicle, must notify his or her supervisor and the CEO or designee immediately, but in no case later than 24 hours. Conviction for such offense may be grounds for loss of BWC vehicle privileges and/or further disciplinary action.
7. All persons operating BWC vehicles shall, at all times, drive defensively and take actions behind the wheel that will convey a favorable impression to the public.
  8. No personal items are to be stored in the vehicles. BWC shall not be liable for the loss or damage of any personal property transported in the vehicle.

### **Additional policies and procedures for personal vehicles:**

1. If it can be determined that a client has caused damage to a staff member/volunteer's vehicle, Bill Wilson Center will reimburse the individual up to \$300 or cover the amount of their automobile comprehensive coverage deductible, whichever is less.
2. Individuals operating personal vehicles on the job are required to maintain a mileage reimbursement report detailing odometer readings, starting and ending location, purpose, and total miles. Mileage reimbursement forms are to be approved by the employee's supervisor and turned into accounting monthly. Blank mileage reimbursement forms can be found on the staff website. See policy 2.16.01 Reimbursement for Mileage for more information.

## **4.07.01 Accidents**

### **Accidents in Personal Vehicles**

In the event of an accident in your personal vehicle, on agency time and for agency business:

- You must follow all applicable laws and any procedures set forth by your automobile insurance company. Call the local police when practical and/or required by state law to report the accident. State law requires that you must report an accident if: more than \$500 in damages was done to the property of any person and/or anyone was injured (no matter how slightly) or killed.
- If BWC clients are in the vehicle at the time of the accident, ensure their safety and well-being, call for medical assistance if required and notify the Program Manager and **Director** immediately. You must follow all other reporting requirements for client incidents as set forth by program or other authorized agency (i.e., Community Care Licensing).
- You must complete a Driver's Accident Report Form and submit to your supervisor within 4 hours of the accident when practical (or within 24 hours if you are injured and unable to complete the form immediately). You must include all information about the accident, damage to vehicles or other property, people involved including other drivers, BWC clients or other staff and any other pertinent details. Your supervisor will investigate the accident and provide details and a copy of the Driver's Accident Report Form to the **CEO or designee** within 24 hours of the accident.

- If you are injured in a vehicle accident while driving your personal vehicle on agency time and for agency business, you will be covered by Worker's Compensation and should report your injury immediately to your supervisor AND the **CEO or designee**. If you are taken to a hospital by emergency vehicle, you must notify your supervisor AND the **CEO or designee** as soon as possible; but no later than 24 hours after the incident.

### Accidents in BWC-Owned Vehicles

In the event of an accident in a BWC-owned vehicle:

- You must follow all applicable laws and any procedures. Call the local police when practical and/or required by state law to report the accident. State law requires that you must report an accident if: more than \$500 in damages was done to the property of any person and/or anyone was injured (no matter how slightly) or killed. Do not admit fault at any time during the exchange of information of investigation of the accident.
- If BWC clients are in the vehicle at the time of the accident, ensure their safety and well-being, call for medical assistance if required and notify the program Manager and Director immediately. You must follow all other reporting requirements for client incidents as set forth by program or other authorized agency (i.e., Community Care Licensing).
- You must notify your supervisor of the accident immediately.
- A "What to Do in Case of an Accident" envelope, which includes a Driver Accident Report Form, is in the glove box of all BWC vehicles. You must complete a Driver's Accident Report Form and submit to your supervisor within 4 hours of the accident when practical (or within 24 hours if you are injured and unable to complete the form immediately). You must include all information about the accident, damage to vehicles or other property, people involved including other drivers, BWC clients or other staff and any other pertinent details. Your supervisor will investigate the accident and provide details and a copy of the Driver's Accident Report Form to the **CEO or designee** within 24 hours of the accident.
- If you are injured in a vehicle accident while driving a BWC-owned vehicle, you will be covered by Worker's Compensation and should report your injury immediately to your supervisor AND the **CEO or designee**. If you are taken to a hospital by emergency vehicle, you must notify your supervisor AND the **CEO or designee** as soon as possible but no later than 24 hours after the incident.
- Contact the Facilities Manager immediately if the BWC vehicle needs to be towed or is otherwise inoperable. Follow any procedures included in the "What to Do in Case of an Accident" envelope. Do not leave BWC vehicles unattended after an accident.

In the event of an avoidable accident, traffic citation, other incident involving improper use of a vehicle, or failure to comply with any part or procedure of this policy, the manager shall take corrective action designed to prevent recurrence of the incident. Accidents and/or incidents involving damage to BWC vehicles will be logged and tracked. Corrective action may include any of the following: training, re-training, disciplinary warning, suspension, or other corrective actions up to and including dismissal. Bill Wilson Center reserves the right to evaluate all circumstances and any mitigating evidence in determining corrective action to be taken.

#### 4.07.02 Breakdowns in BWC Vehicles

If a BWC vehicle breaks down or malfunctions and becomes inoperable while you are driving or responsible for the vehicle:

- Ensure that you move the vehicle to a safe location if possible. If not possible, turn on the hazard/emergency lights on the vehicle
- Follow the procedures located in the glove box to obtain assistance or call the Facilities Manager immediately.
- Do not leave the vehicle unattended unless instructed to do so by the Facilities Manager, but if it is not safe to wait in the vehicle, make sure you remove the keys, lock the vehicle and wait in a safe location until help arrives (or the Facilities Manager gives you further instructions).
- Report the incident to your supervisor if you have not already done so.

#### **4.08 Standards and Use of Bill Wilson Center Email**

Bill Wilson Center uses email as the primary mode of agency communication. Employees are asked to check their email often and reply to emails by the end of the next business day unless you are on vacation/leave (employees must set up an out of office reply when on vacation/leave and give an alternate contact person and expected date of return). All employees will use the following standard signature:

**First Name Last Name (and any Degrees or Licenses)**

**Title**

**Pronouns**

**Bill Wilson Center**

**Address of Program or Office Location**

**City, State Zip**

**Phone: (408) xxx-xxxx Fax: (408) xxx-xxxx**

**[www.billwilsoncenter.org](http://www.billwilsoncenter.org)**

***Building Connections!***

***This constitutes an electronic communication under the Electronic Communications Privacy Act, 18 USC 2510. Its disclosure is strictly limited to the intended recipient. Receipt by anyone other than the intended recipient does not constitute a loss of the confidential nature or privileged nature of the communication. Any review or distribution by others is prohibited. If you are not the intended recipient, contact the sender and delete all copies of this communication.***

Your supervisor or designee will assist employees with the set-up of this standard email signature.

Exempt staff that chooses to receive their work email on their cell phone must contact [support@corpwest.com](mailto:support@corpwest.com) for set-up assistance. Exempt staff should never attempt to establish a connection to any of Bill Wilson Center servers on their own. Non-exempt staff is never allowed or required to receive their work email on their cell phone. The election by exempt staff to receive work emails on their cell phone is a personal choice and preference and not a requirement by Bill Wilson Center. The IT Contractor will track staff that request this option and may revoke privileges if procedures are not being followed. Bill Wilson Center is not responsible for any damage caused to personal cell phones.

#### **Protocol and Etiquette for Email:**

1. The "To" line is for people you are directly addressing. The "Cc" line is for people you are indirectly addressing or sending for FYI purposes (and you do not need a reply from them).
2. The "Subject" line should always be completed. Do not use the "Subject" line to ask a question or in place of completing the body of the e-mail.
3. "Reply All" should be used with care. Please note that when you use "Reply All" it multiplies the responses by the number of people that receive the email. An e-mail that goes to 12 people that receives a "Reply All" from all of them creates 144 e-mail messages! There are times when "Reply All" needs to be used. Use discretion when using this feature.

4. Email messages should be concise and to the point. Think of it as a phone conversation, but you are typing rather than speaking.
5. Use proper spelling, grammar and punctuation. There are “spell check” and “grammar check” buttons that can be used. There is also a feature that allows for auto-spell check before emails goes out.
6. Avoid using ALL CAPS on emails. Along the same line, do not use all lower case letters either. Use appropriate capitalization on all emails.
7. Please read all e-mails before you hit “Send”! If you are forwarding an email and/or including new recipients on an email, please review the entire thread to make sure there are no confidential or “need to know” items included in previous threads before sending.
8. If you receive an offensive email, report it to your supervisor immediately (and make a copy for IT if possible). Supervisors should talk to IT about ongoing offensive email problems as certain sites can be blocked using our server to prevent ongoing issues.
9. Do not open attachments from sources that are unknown to you. Attachments often have viruses that could be harmful to your computer and our servers. If you receive an attachment from an unknown (or an unexpected) sender, delete it immediately without opening it.
10. Use secure email as appropriate for any confidential information and attachments being sent to non BWC employees

#### **4.09 Standards and Use of Bill Wilson Center Voicemail**

Bill Wilson Center employees who have an agency phone extension should ensure that their voicemail is properly recorded. The standard voicemail greeting should be recorded as soon as possible after hire and should include, at minimum, the employees full name, agency name, title and program. Employees are asked to record an “out of office greeting” if they will be away from work formore than two days. Employees should check their voicemail often and return business calls within 48 hours if not away from the office. Employees should report any issues with their phone or voicemail to their supervisor as soon as possible.

#### **4.10 Employee ID Badges/Key Fobs**

Employees are required to wear their official Bill Wilson Center ID badge, in a visible location outside of their clothing, on work premises and when out on agency business. New hires will be provided with an ID badge within 30 days of hire. Employees are responsible for the safe keeping of their badge. If a replacement badge is needed to cover loss or theft, the employee is responsible for the \$10 replacement fee.

Employees that are issued key fobs for the main office are responsible for the safe keeping of their fob. The Facilities Manager is responsible for tracking these fobs and should be contacted immediately if it is lost or stolen. If a replacement key fob is needed to cover loss or theft, the employee is responsible for the \$10 replacement fee.

#### **4.11 Social Media Policy**

Bill Wilson Center understands that social media can be a fun and rewarding way to share your life and opinions with co-workers, family, and friends around the world. Social media can also be a great tool for promoting BWC’s mission and activities, encouraging volunteerism, soliciting donations, and increasing awareness of BWC’s members and the role they play in the community. However, use of social media also presents risks and carries with it certain responsibilities. To assist you in making responsible decisions about your use of social media, BWC has established this policy for appropriate social media use.

### **What this policy covers**

“Social media” includes all means of communicating or posting information or content of any sort on the Internet, including to your own or someone else’s web log or blog; journal or diary; personal website; social networking or affinity website, such as Facebook, Twitter, Instagram or LinkedIn; photo- or video-streaming website, such as Snapchat, What’s App, YouTube, Instagram, or Flickr; web bulletin board; or chat room; as well as any other form of electronic communication, such as email. This policy applies to all social media, whether or not associated or affiliated with BWC, and to communications made or received on a computer, smartphone, tablet, or any other electronic device, whether or not that device is property of BWC.

### **How to use social media**

Properly used, social media can be a valuable part of promoting BWC’s mission, and BWC encourages employees and volunteers to take advantage of it as a communication tool. Ultimately, you are solely responsible for what you post online, and we expect that you will exercise sound judgment in your social media activities. Before creating online content, carefully consider the risks and rewards.

### **Get authorization to post on Bill Wilson Center official sites**

Employees and volunteers who wish to post to BWC’s official website or social media pages on BWC’s behalf must obtain permission from the Chief Community Resources Officer or the CEO. Do not otherwise represent yourself as a spokesperson for Bill Wilson Center.

### **Be mindful of revealing confidential information and trade secrets**

Whenever you post, maintain the confidentiality of BWC trade secrets and private or confidential information, as required under BWC’s confidentiality policy including client information. Such information may also include membership and referral mailing lists; computer processes and codes; pending project or program proposals; marketing planning and survey data; and research and development strategies. Do not post internal reports, policies, procedures, or other internal confidential communications. Refrain from posting anything that reveals client or donor information.

### **Be respectful**

Always be fair and courteous to your fellow employees and volunteers, clients, member organizations, donors, board members, and others who work on behalf of BWC’s interests. Inappropriate postings, including pictures, videos, and tags, about such persons that may include discriminatory or harassing remarks or threats of violence, or similar inappropriate or unlawful conduct, will not be tolerated; creating such postings may subject you to disciplinary action, up to and including termination. If you are unsure about whether a particular post is inappropriate, please contact the Chief Community Resources Officer before posting.

### **Be transparent**

Whenever BWC is included in any of your social media activities, be clear and open about the fact that you are an employee or volunteer. Make it clear that you are expressing only your personal opinion, that your views do not represent those of BWC and that you are not speaking on behalf of BWC. You can do so with a disclaimer such as “The postings on this site are my own and do not necessarily reflect the views of BWC.” If you create a link from your blog, website, or other social networking site to a BWC website, identify yourself as a BWC employee or volunteer.

### **Be honest and accurate**

Make sure you are always honest and accurate when posting information or news. If you make a mistake, correct it quickly. Never post any information or rumors that you know or suspect to be false about BWC. Be open about any previous posts you have altered. Remember that the Internet archives almost everything; oftentimes even deleted postings can be searched.

### **Refrain from prohibited political activities**

Bill Wilson Center is a section 501(c)(3) organization and may not engage in certain political activity, such as supporting or opposing political candidates, directly or indirectly. Do not post content which violates these prohibitions on political activity on websites BWC hosts or sponsors, on social media pages managed by BWC's directors and officers, or through use of BWC's email list-serv or BWC email accounts. Actions that violate the prohibition include, for example: posting statuses encouraging others to vote for or against a candidate, using BWC's Facebook page to "friend" or "like" a political candidate, or posting a link to another organization's endorsement of a candidate on BWC's website, Facebook page, or twitter feed.

Do not use BWC equipment to engage in any political activity, even if the content is posted to your personal webpage. This includes the use of a BWC email account, even if the content includes a disclaimer that it represents only your personal views. Employees who wish to express their political views on their personal websites or social media pages should include a disclaimer that the content is being posted in their personal capacity only.

### **Voice complaints appropriately**

We encourage you to resolve work-related complaints by speaking directly with your co-workers or supervisors rather than by posting complaints to a social media outlet. Employees can use our complaint submission processes. Nevertheless, if you decide to post complaints or criticisms using social media, avoid using statements, photographs, video, or audio that could reasonably be viewed as malicious, obscene, threatening, or intimidating, that disparages BWC, or that might constitute harassment or bullying. Examples of such conduct might include offensive posts meant to intentionally harm someone's reputation or disparage a client. None of the policies in this Employee Handbook shall be interpreted or applied to interfere with the protected rights of employees to discuss or share information related to their wages, benefits, and terms of employment amongst themselves or with outside parties.

### **Don't let social media interfere with your work**

Refrain from using social media while on work time or on equipment BWC provides, unless it is work-related as authorized by a supervisor or consistent with BWC's technology and equipment usage policies. Do not use BWC email addresses to register on social networks, blogs, or other websites intended for personal use. Do not "friend" clients or former clients on any site or other media. Former clients are those that have received BWC services within the last 12 months.

### **Be a part of your online community**

This policy is not intended to discourage your use of social media. You should still feel free to use social media in a positive manner, and in line with this policy, to communicate with others and promote BWC's mission and activities, encourage volunteerism, solicit donations, and increase awareness of BWC's members and the role they play in the community.

## **Administration of BWC's Social Media Policy**

### **Coverage**

This policy applies to all Bill Wilson Center employees and interns. It also applies to volunteers involved in managing BWC's social media and online presence.

### **Retaliation is prohibited**

BWC will not take negative action against any employee for reporting possible violations of this policy or for cooperating in an investigation. Any employee who retaliates against another employee for reporting a possible violation of this policy or for cooperating in an investigation will be subject to disciplinary action, up to and including termination.

### **BWC access to personal social media**

BWC will not require or request that an employee or volunteer disclose a username or password for the purpose of accessing his or her social media accounts or information displayed on personal social media pages. BWC will not take negative action against an employee or volunteer for refusing to disclose such information or to provide access to a personal social media account.

### **Violation of this policy**

Keep in mind that any conduct that violates this policy or any other BWC policy, or that adversely affects your job performance, the performance of your fellow employees, volunteers may result in disciplinary action, up to and including termination. BWC's disciplinary procedures for employees are set out in the employee handbook.

### **Other media contacts**

Social media is only one way that BWC communicates to the public. Employees and volunteers must contact the Chief Community Resources Officer or the CEO first before speaking to the media on BWC's behalf. All media inquiries should be directed to the Chief Community Resources Officer.

### **For more information**

If you have questions or need further guidance about this policy, please contact the Chief Community Resources Officer.

## **4.12 Incident Reporting**

Employees are required to complete an Incident Report Form for any incidents occurring on BWC property and/or affecting BWC staff, clients, volunteers or visitors. The Incident Report Form is available at your site or on the staff website and must be submitted to your supervisor within 24 hours of the incident (or sooner if practical). Supervisors must report incidents and submit a copy of the Incident Report Form to the Chief Program Officer and CEO or designee within 24 hours of receiving the Incident Report Form. For Community Care Licensing and Mental Health Services programs, the incident report form required by those agencies will suffice for reporting purpose and a copy must be submitted to the Chief Program Officer and CEO or designee within 24 hours of completing the report. Some examples of reportable incidents include (but are not limited to):

- Any incidents involving injury to staff, volunteers, clients or visitor
- Any altercations or other violent encounters involving staff, volunteer, clients or visitors
- Any incidents involving damage to BWC property or equipment
- Any incidents where police intervention was involved
- Any incidents that may become a liability issue for BWC

## **4.13 Program Quality Improvement (PQI)**

Each program and each employee is responsible on some level for program quality improvement. The agency PQI initiative is led by the Chief Program Officer. The PQI committee meets monthly and includes member representation from all programs and departments of BWC. Members are rotated from time to time for inclusion purposes and for any special projects the PQI committee may be working on that require a certain employee expertise. All employees participate in quarterly PQI exercises with their teams to improve areas or for problem solving. All PQI Committee information, minutes and other materials are posted on the staff portal for everyone's review.

## **4.14 Universal Precautions**

Employees providing direct services, and especially those employees working in residential programs, assume responsibility of knowledge of Universal Precautions. These include, but are not limited to, blood borne pathogens, lice, bed bugs, etc. BWC require direct service staff to receive training in the

more common universal precautions (training is provided to new hires and on an annual basis thereafter).

Providing services to homeless youth can come with challenges including violent reactions by clients or violent interactions between clients. At no time are employees expected to physically involve themselves in separating clients who are fighting or physically trying to deescalate/restrain a client. Employees are required to remove themselves from any dangerous situation, follow their program crisis management protocol and contact their manager.

#### **4.14.01 Pandemic Response**

When a pandemic is declared, Bill Wilson Center will comply with all local, state and federal instructions and restrictions. BWC may temporarily update or change policies and procedures in order to comply with requirements. BWC services are usually declared “essential” during pandemic restrictions and other emergencies and staff will receive instructions for any changes or updates to work sites, schedules or programming. Managers are responsible for ensuring their staff receive communication updates and comply with instructions.

### **4.15 BWC Staff Portal**

All employees will be granted access to the Staff Portal upon hire. The Staff Portal is accessible from the Bill Wilson Center website at <https://www.billwilsoncenter.org/> and provides access to employee information and forms including but not limited to:

- Holiday and Pay Schedules
- Staff Directory (also accessible from Paycom)
- Reimbursement Request Forms
- Direct Deposit, Payroll Advance Request Forms
- Policies and Procedures

For help with your Staff Portal username or password, contact the HR/Admin Services Specialist to reset your password or look up your username.

## Employee Benefits

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## 5.01 Holidays

Effective January 1, 2022, Bill Wilson Center will be observing the following holidays:

- New Year's Day
- Martin Luther King Jr.'s Birthday
- Presidents' Day
- Choice of one: Cesar Chavez Birthday or Juneteeth (have approval of supervisor)
- Memorial Day
- July 4th — Independence Day
- Labor Day
- Indigenous People's Day
- Thanksgiving Day and the Friday after
- Christmas Eve and Christmas Day
- New Year's Eve

Two additional holidays have been added: Cesar Chavez Day and Juneteenth Day. Employees will have the option of electing ONE of the holidays they would like to observe in addition to the 12 holidays already observed. Employees must notify their supervisor at least 2 weeks prior to the holiday they are electing to observe.

When a holiday falls on a Saturday or Sunday, it is usually observed on the preceding Friday or the following Monday. However, holiday observance will be announced in advance. Certain holidays may be observed in the previous or following year depending on where they fall on the calendar.

Each employee's eligibility for holiday pay begins on the first day of the month following the employee's hire (temporary and relief/on-call employees are not eligible for holiday pay). If a holiday falls on a vacation day, that day will be charged as holiday pay, not vacation pay.

If you are required to work on a paid scheduled holiday or are normally scheduled to be off on a paid holiday, you may take another day off within the same or subsequent pay period. You must coordinate that day with your supervisor. No more than two make up holidays can be taken consecutively and none will be taken in conjunction with vacation.

Part-time employees working a standard workweek of 20 hours or more will receive prorated holiday pay based on the regularly scheduled weekly hours. If a part-time employee takes off a full 8-hour day, the balance of the 8 hours less the earned holiday time will be charged to vacation.

Temporary employees, relief/on-call employees, part time employees working a standard workweek of less than 20 hours per week and employees on leaves of absence are NOT eligible for paid holiday hours.

**5.01.01 Exception for regular full time or part time (20 hours or more) Residential Counselors, Case Managers, or other designated staff working in residential programs or programs that remain open during holidays. Examples of programs include Safety Net Shelter, Drop-In Center, Respite, Young Adult Shelter, Interim Housing, Drop-In Center, and Call Center. (This is not an all-inclusive list of programs. Programs will be identified by CEO).**

Staff that fall under this category will accrue the equivalent of 13 holidays at eight hours each day (total of 104 hours a year). Bill Wilson Center has 26 pay periods a year. Staff will receive equal holiday time accruals for each pay period, so, 104 hours divided by 26 pay periods equals four hours accrued each pay period. Staff will request their holiday time-off through approval, in advance, by their supervisor. Staff cannot take holidays before accruing them, and cannot accrue more than six holidays (total of 48 hours). After 48 hours is accrued, no additional holiday hours will accrue until employee used holiday hours and reduces accrual to under 48 hours. Request for holiday time off should be completed through Paycom using the PTO request instructions/procedures and noting time as holiday when submitting for approval.

## 5.02 Paid Time Off

Bill Wilson Center offers paid time off (PTO) to employees for their use as vacation, sick or personal leave time. Employees begin accruing PTO on the first day of the month following the employee's date of hire. Employees can use their accrued PTO for vacation or personal leave, whenever work schedules permit, after receiving approval from their supervisor through Paycom. **Employees should provide as much notice as possible when taking PTO. Managers will review employee requests and provide a response within 10 working days of request. During certain times of the year (audits, year-end, etc.) and at their discretion, managers may deny PTO if it would interfere with agency operations.**

In order to use PTO for unexpected emergency situations or illnesses, an employee needs to contact their supervisor before their regular shift begins.

Employees on leave do not accrue paid time off. Paid time off will be accrued on the following basis:

<b>1-2 years of service:</b>	<b>160 hours of paid time off/year, accrued at 13.33 hours/month; maximum accrual of 240 hours;</b>
<b>3-4 years of service:</b>	<b>200 hours of paid time off/year, accrued at 16.67 hours/month; maximum accrual of 280 hours; and</b>
<b>5 years of service and thereafter:</b>	<b>240 hours of paid time off/year, accrued at 20 hours/month; maximum accrual of 320 hours.</b>

An employee may not use paid time off before its accrual. Employees will not be paid for any time in excess of accrued paid time off. An employee whose employment terminates will be paid for accrued, unused paid time off.

Paid time off can accrue to a maximum number of hours based on years of service (as specified above). Once this maximum is reached, no further paid time off will be earned until some paid time off is used. When some paid time off is used, paid time off will begin to accrue again. Bill Wilson Center does not grant retroactive paid time off for any period of time during which the accrued paid time off was at the cap.

Part-time employees working a standard workweek of 20 hours or more will accrue paid time off on a pro rata basis. Temporary employees, relief/on call employees, part time employees working a standard workweek of less than 20 hours per week and employees on leaves of absence do not accrue PTO.

Employees may not take more than four weeks of accrued PTO (160 hours) at one time without prior approval by the CEO or designee – requests should be sent to the CEO or designee.

The Board of Directors and CEO may approve a different PTO accrual schedule for certain staff at their discretion.

All PTO requests should be made through the Paycom system.

### 5.02.01 Compensatory ("Comp") Time Off and/or Working from Home

Bill Wilson Center does not have a compensatory time off policy. **Hourly and exempt employees will always use any accrued PTO when any work hours are missed;** if no PTO is available, the missed time will be unpaid for hourly employees.

Employees on FMLA, CFRA or other approved leave (including intermittent leave) may be approved to work from home if a health care provider certifies that it would be acceptable and if approved by the CEO or designee. Under normal business operations, hourly employees are not approved to work from home regardless of leave status.

### **5.02.02 Paid Sick Leave (AB1522)**

Effective July 1, 2015 employees who do not qualify for BWC PTO (including relief/on-call and temporary staff) will accrue paid sick leave. After a 30-day waiting period, these employees begin to accrue 1 hour of sick leave for every 30 hours worked. A 90-day waiting period applies to new hires. Paid Sick Leave accrual is capped at 48 hours total and annual use is capped at 24 hours (3 days). There is no carryover of accrued sick leave other than maximum allowed of 48 hours total at any time. Sick days are not paid out at termination of employment.

### **5.02.03 Required Use of PTO before Unpaid Leave**

You are required to take accrued and unused Paid Time Off (PTO) before taking unpaid leave or having unpaid absences. Family and Medical Leave (under both state and federal law) are included in this requirement, unless the absence is pregnancy-related.

Employees who are absent because of their own disability may be eligible for State Disability Insurance (SDI) benefits. SDI payments do not begin until after you have been absent from work for 7 calendar days. If you have accrued PTO, PTO will be used for the first 7 days before SDI payments begin.

SDI benefits do not replace all of your usual wages. Your SDI benefits may be supplemented with any accrued and unused PTO.

## **5.03 Insurance Benefits and Eligibility**

### **5.03.01 Health Insurance**

Bill Wilson Center provides health insurance benefits for eligible employees. All part-time employees regularly scheduled for 24 or more hours of work and all regular full time employees are eligible for health benefits. New employee benefits begin on the first day of the month following hire. Bill Wilson Center offers medical, dental and vision coverage. Life/AD&D Insurance, Long Term Disability Insurance, Travel Assistance Program and Employee Assistance Program (EAP) are provided to full-time employees working more than 32 hours. Temporary and/or Relief staff are not eligible for medical, dental, vision, Life/AD&D insurance, Long Term Disability, Travel Assistance Program or Employee Assistance Program.

Dependent coverage for medical, dental and vision benefits is available to eligible employees at the employee's expense.

In the event of an increase in medical insurance premium rates, all employees may be required to contribute to the cost of increased premiums to retain coverage. Details about medical insurance coverage are available in a separate publication distributed by the CEO or designee.

### **5.03.02 Eligibility and Terms for Medical/Dental/Vision/Life/AD&D/LTD/Employee (EAP) and Travel Assistance Programs**

Eligibility for insurance is dependent on the classification of employment as it relates to your standard work week hours. An eligible employee may be required to contribute all or part of the cost of his or her health, dental, life and/or LTD insurance. Employees will be informed of this amount at the time of hire. Any change in the amount will be committed in writing one-month prior to change. A description of this eligibility is as follows:

- A standard workweek is determined upon hire and does not change unless approved by the CEO or designee. The standard workweek does not fluctuate even though in a given week an employee may work a few less or few more hours than their standard workweek. The employee is compensated for additional hours worked, but it does not affect the standard workweek for benefits eligibility which will remain constant.

- Regular full-time employees are eligible for full insurance benefits starting the first of the month following date of hire. A regular full-time employee will work a standard workweek of 32 to 40 hours. The employee's insurance will be paid by the agency. Dependent coverage for medical, dental and vision is available at the full expense of the employee.
- Regular part-time employees working a standard work week of 24 to 31 hours are eligible for health, dental and vision insurance on a pro-rated basis – that is the employee will pay part of the insurance premiums based on their standard work week hours. Dependent coverage for medical, dental and vision is available at the full expense of the employee. Part-time employees are not eligible for Life/AD&D Insurance, Long Term Disability, Employee Assistance Program or Travel Assistance Program.
- Regular part-time employees working a standard workweek of 23 hours or less are not eligible for medical, dental, vision, Life/AD&D Insurance, Long Term Disability, Employee Assistance Program or Travel Assistance Program.
- Temporary and Relief/On-Call employees are not eligible for medical, dental, vision, Life/AD&D Insurance, Long Term Disability, Employee Assistance Program or Travel Assistance Program.

### **5.03.03 State Disability Insurance (SDI) and Paid Family Leave Benefits (PFL)**

Each employee contributes to the State of California to provide disability insurance mandated by the California Unemployment Insurance Code. Contributions are made through a payroll deduction.

Disability insurance (SDI) is payable when you cannot work because of illness or injury not caused by employment at Bill Wilson Center or when you are entitled to temporary workers' compensation at a rate less than the daily disability benefit amount.

Paid Family Leave (PFL) is a partial wage replacement insurance plan administered by the EDD for eligible workers who have absences longer than seven workdays related to care of a seriously ill child, spouse, parent, or registered domestic partner, grandparent, grandchild, sibling or parent-in-law or to bond with a new child. Benefits are paid directly by the EDD.

Specific rules and regulations governing SDI and PFL are available from the CEO or designee or at [www.edd.ca.gov](http://www.edd.ca.gov).

### **5.03.04 Retirement Plan**

BWC offers employees a 401K retirement plan. Employees can defer their salary to their 401K savings account from day one of hire. While BWC does not match employee contributions, BWC may approve discretionary contributions from time to time. If discretionary contributions are approved, only eligible employees will qualify for the contribution. Eligibility requirements can be reviewed with the CEO or designee, but generally eligibility requires an employee to be employed for at least 1 year and have worked a minimum number of hours. Discretionary contributions may be pro-rated for new hires when their first contribution is approved.

Highly compensated employees of BWC will participate in the agency 403b program. Highly compensated employees that meet eligibility for discretionary contributions will have those contributions made to the BWC 401K plan. BWC also provides a 457 deferred compensation plan for Executive Team members as invited by the CEO.

Retirement accounts are professionally managed by a third party and employees have 24/7 access to their accounts via online account and phone. New hires receive retirement information and forms on day 1 and forms are always available on the staff website portal.

## **5.04 Leaves of Absence**

Bill Wilson Center may grant leaves of absence to employees in certain circumstances. Request any leave in writing as far in advance as possible, keep in touch with your supervisor during your leave, and give prompt notice of any change in your anticipated return date. If your leave expires and you fail to return to work without contacting your supervisor or the personnel office, the Company will assume that you do not plan to return and that you have terminated your employment.

### **5.04.01 Health Insurance Premiums While on Leave**

Bill Wilson Center will continue to pay for health insurance for employees on approved FMLA and/or CFRA leaves of absence up to a maximum of four months. After that, you may self-pay premiums under the provisions of COBRA. The CEO or designee can give you additional information. For employees on Pregnancy Disability Leave, BWC will continue to pay for the employee health insurance for the extent of the leave.

### **5.04.02 Family/Medical Leave**

Any leave taken under this provision that qualifies as leave under the state and/or federal Family and Medical Leave Acts will be counted as family/medical leave and charged to your entitlement of 12 workweeks of family/medical leave in a 12-month period.

## **5.05 Pregnancy Disability Leave**

Pregnancy, childbirth, or related medical conditions will be treated like any other disability, and an employee on leave will be eligible for temporary disability benefits in the same amount and degree as any other employee on leave. Such leave is unpaid, except to the extent that an employee elects to use accrued PTO time as a part of her leave.

Any female employee planning to take pregnancy disability leave should advise the CEO or designee as early as possible. The individual should make an appointment with the CEO or designee to discuss the following conditions:

- Employees who take pregnancy disability must inform Bill Wilson Center when a leave is expected to begin and how long it will likely last. If the need for a leave or transfer is foreseeable, employees must provide notification at least 30 days before the pregnancy disability leave or transfer is to begin. Employees must consult with the CEO or designee regarding the scheduling of any planned medical treatment or supervision in order to minimize disruption to the operations of the center. Any such scheduling is subject to the approval of the employee's health care provider;
- If 30 days' advance notice is not possible, notice must be given as soon as practical;
- Upon the request of an employee and recommendation of the employee's health care provider, the employee's work assignment may be changed if necessary to protect the health and safety of the employee and her child;
- Requests for transfers of job duties will be reasonably accommodated if the job and security rights of others are not breached;
- Temporary transfers due to health considerations will be granted when possible. However, the transferred employee will receive the pay that accompanies the job, as is the case with any other temporary transfer due to temporary health reasons;
- Pregnancy leave usually begins when ordered by the employee's health care provider. The employee must provide Bill Wilson Center with a certification from a health care provider. The certification indicating disability should contain:

- The date on which the employee became disabled due to pregnancy;
  - The probable duration of the period or periods of disability; and
  - A statement that, due to the disability, the employee is unable to perform one or more of the essential functions of her position without undue risk to herself, the successful completion of her pregnancy, or to other persons.
- Leave returns will be allowed only when the employee's health care provider sends a release;
  - An employee will be allowed to use accrued PTO (if otherwise eligible to take the time) during a pregnancy disability leave;
  - The Center will continue to pay for health insurance for employees on PDL
  - Periods of leave under this section will not constitute a break in period of service (seniority);
  - PTO does not accrue during Pregnancy Disability leave; nor will holidays be paid; and
  - Duration of the leave will be determined by the advice of the employee's health care provider, but employees disabled by pregnancy may take up to four months. Part-time employees are entitled to leave on a pro rata basis. The four months of leave includes any period of time for actual disability caused by the employee's pregnancy, childbirth, or related medical condition. This includes leave for severe morning sickness and for prenatal care.
  - Upon return from leave, employee must notify HR Manager for need of accommodation for lactation, if applicable. BWC will provide the use of a room or other location that is in close proximity to the employee's work area. This space will be free from intrusion and will not be a bathroom. BWC will provide a place to sit, a surface to place breast pump on (along with other personal items) and access to electricity. A sink and refrigerator will also be available at the worksite. This space will not be used solely for lactation but when a lactating employee needs to use it, they will get priority.

Leave does not need to be taken in one continuous period of time and may be taken intermittently, as needed. Leave may be taken in increments of one half hour.

Under most circumstances, upon submission of a medical certification that an employee is able to return to work from a pregnancy disability leave, an employee will be reinstated to her same position held at the time the leave began or to an equivalent position, if available. An employee returning from a pregnancy disability leave has no greater right to reinstatement than if the employee had been continuously employed.

## **5.06 Family and Medical Leave/California Family Rights Act**

State and federal family and medical leave laws provide up to 12 workweeks of unpaid family/medical leave within a 12-month period, under the following conditions:

- \* The employee has more than 12 months of service;
- \* The employee has worked at least 1,250 hours during the previous 12-month period before the need for leave; and
- \* The employee is employed at a work site where there are 50 or more employees within a 75-mile radius.

Leave may be taken for one or more of the following reasons:

- \* The birth of the employee's child, or placement of a child with the employee for adoption or foster care;

- \* To care for the employee's spouse, domestic partner (CFRA), child, or parent who has a serious health condition; or
- \* For a serious health condition that makes the employee unable to perform his or her job.

A serious health condition is illness, injury, impairment, or physical or mental condition that involves (1) inpatient care; (2) incapacity for more than three full days with continuing treatment by a health care provider; (3) incapacity due to pregnancy or prenatal care; (4) incapacity due to, or treatment for, a chronic serious health condition; (5) permanent or long-term incapacity for a condition for which treatment may not be effective, such as a terminal illness; or (6) absence for multiple treatments for either restorative surgery following an injury or accident, or a condition that would require an absence of more than three days if not treated or prevents the qualified family member from participating in school or other daily activities. Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity of more than 3 consecutive calendar days combined with at least two visits to a health care provider or one visit and a regimen of continuing treatment, or incapacity due to pregnancy, or incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment.

Eligible employees whose spouse, son, daughter or parent is on covered active military duty or call to covered active duty status may use their 12-week leave entitlement to address certain qualifying exigencies. Qualifying exigencies may include attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, attending certain counseling sessions, and attending post-deployment reintegration briefings.

FMLA also includes a special leave entitlement that permits eligible employees to take up to 26 weeks of leave to care for a covered service member during a single 12-month period. A covered service member is: (1) a current member of the Armed Forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness; or (2) a veteran who was discharged or released under conditions other than dishonorable at any time during the five-year period prior to the first date the eligible employee takes FMLA leave to care for the covered veteran, and who is undergoing medical treatment, recuperation, or therapy for a serious injury or illness.

For purposes of calculating the 12-month period during which 12 weeks of leave may be taken, an employee will be entitled to 12 workweeks of leave during the year beginning on the first date family leave is taken. The next 12-month period would begin the first time family leave is taken after completion of the previous 12-month period.

Under most circumstances, leave under federal and state law will run at the same time and the eligible employee will be entitled to a total of 12 weeks of family and medical leave in the designated 12-month period.

However, leave because of the employee's disability for pregnancy, childbirth or related medical condition is not counted as time used under California law (the California Family Rights Act). Time off because of pregnancy disability, childbirth or related medical condition does count as family and medical leave under federal law (the Family and Medical Leave Act). Employees who take time off for pregnancy disability and who are eligible for family and medical leave will also be placed on family and medical leave that runs at the same time as their pregnancy disability leave. Once the pregnant employee is no longer disabled, she may apply for leave under the California Family Rights Act, for purposes of baby bonding.

Any leave taken for the birth, adoption, or foster care placement of a child does not have to be taken in one continuous period of time. California Family Rights Act leave taken for the birth or placement of a child will be granted in minimum amounts of two weeks. However, Bill Wilson Center will grant a request for a California Family Rights Act leave (for birth/placement of a child) of less than two weeks' duration on any two occasions. Any leave taken must be concluded within one year of the birth or placement of the child with the employee.

**The following procedures shall apply when an employee requests family leave:**

Please contact the HR Manager as soon as you realize the need for family/medical leave.

If the leave is based on the expected birth, placement for adoption or foster care, or planned medical treatment for a serious health condition of the employee or a family member, the employee must notify the Center at least 30 days before leave is to begin. The employee must consult with his or her supervisor regarding scheduling of any planned medical treatment or supervision in order to minimize disruption to Center operations. Any such scheduling is subject to the approval of the health care provider of the employee or the health care provider of the employee's child, parent, or spouse/domestic partner. If the employee cannot provide 30 days' notice, the Center must be informed as soon as is practical.

If the Family and Medical Leave Act/California Family Rights Act request is made because of the employee's own serious health condition, Bill Wilson Center may require, at its expense, a second opinion from a health care provider that the Company chooses. The health care provider designated to give a second opinion will not be one who is employed on a regular basis by the Center.

If the second opinion differs from the first opinion, Center may require, at its expense, the employee to obtain the opinion of a third health care provider designated or approved jointly by the employer and the employee. The opinion of the third health care provider shall be considered final and binding on Center and the employee.

Bill Wilson Center requires the employee to provide certification within 15 days of any request for family and medical leave under state and federal law, unless it is not practicable to do so. The Center may require recertification from the health care provider if additional leave is required.

If the leave is needed to care for a sick child, spouse/domestic partner, or parent, the employee must provide a certification from the health care provider stating:

- \* Date of commencement of the serious health condition;
- \* Probable duration of the condition;
- \* Estimated amount of time for care by the health care provider; and
- \* Confirmation that the serious health condition warrants the participation of the employee.

When both parents are employed by the Center, and request simultaneous leave for the birth or placement for adoption or foster care of a child, the Company will not grant more than 12 workweeks total of family/medical leave for each employee.

If an employee cites his/her own serious health condition as a reason for leave, the employee must provide a certification from the health care provider stating:

- \* Date of commencement of the serious health condition;
- \* Probable duration of the condition; and
- \* Inability of the employee to work at all or perform any one or more of the essential functions of his/her position because of the serious health condition.

Bill Wilson Center will require certification by the employee's health care provider that the employee is fit to return to his or her job.

Failure to provide certification by the health care provider of the employee's fitness to return to work will result in denial of reinstatement for the employee until the certificate is obtained.

Bill Wilson Center will continue to pay for health insurance for employees on approved leaves of absence up to a maximum of four months (or throughout the entire leave for employees on pregnancy disability leave). After that period employees on family/medical leave who are not eligible for continued paid coverage may continue their group health insurance coverage through Bill Wilson Center in conjunction with the federal COBRA guidelines by making monthly payments to Bill Wilson Center for the account of the applicable premium. Employees should contact the CEO or designee for further information.

In some instances, the Company may recover from an employee premiums paid to maintain health coverage if the employee fails to return to work following family/medical leave.

Paid leave *may be* substituted for unpaid leave in the following circumstances:

- \* PTO may be used for any family/medical leave qualifying event.

Under most circumstances, upon return from family/medical leave, an employee will be reinstated to his or her original job or to an equivalent job with equivalent pay, benefits, and other employment terms and conditions. However, an employee has no greater right to reinstatement than if he or she had been continuously employed rather than on leave. For example, if an employee on family/medical leave would have been laid off had he or she not gone on leave, or if the employee's job is eliminated during the leave and no equivalent or comparable job is available, then the employee would not be entitled to reinstatement. In addition, an employee's use of family/medical leave will not result in the loss of any employment benefit that the employee earned before using family/medical leave.

For additional information about eligibility for family/medical leave, contact the CEO or designee.

#### **5.06.01 Time Accrual**

Employees on Family and Medical Leave Act/California Family Rights Act leave will not continue to accrue paid time off (or holiday if applicable) during unpaid Family and Medical Leave Act/California Family Rights Act leave.

#### **5.06.02 Carryover**

Leave granted under any of the reasons provided by state and federal law will be counted as family/medical leave and will be considered as part of the 12-workweek entitlement in a 12-month period. The 12-month period is measured forward from the date any employee's first Family and Medical Leave Act leave begins. Successive 12-month periods commence on the date of an employee's first use of such leave after the preceding 12-month period has ended. No carryover of unused leave from one 12-month period to the next 12-month period is permitted.

#### **5.07 Bereavement Leave**

Bill Wilson Center grants a leave of absence to employees in the event of the death of the employee's immediate family (spouses/domestic partners, children, siblings, parents and step parents, step children and step siblings). An employee with such a death in the family may take up to five (5) work days off with pay with the approval of the CEO or designee.

#### **5.08 Personal Leave of Absence without Pay**

A personal leave of absence without pay may be granted at the discretion of Bill Wilson Center after twelve (12) months of employment to an eligible employee only when recommended by the employee's supervisor and approved by the CEO or designee. Personal leaves will be granted for a period of 30 days and a maximum of 90 days' subject to review and extension each 30 days (90-day maximum).

Unused, accrued PTO must be exhausted before a Personal Leave of Absence without Pay is approved.

During personal leaves of absence, employees will not accrue PTO leave. Also, seniority will be frozen as of the date on which the leave is taken until the employee returns. Employees on approved leave of absence may continue their group hospitalization insurance, provided that they pay in advance the total amount of the premium for the period during which they will be on leave. If employee is on leave for longer than 90-day maximum, they will have the right to continue benefits through COBRA.

At least one (1) week before the expiration of an extended leave of absence, employees must give their supervisor notice of intention to return. Failure of an employee to apply for reinstatement upon expiration of a leave of absence will be considered a voluntary termination.

Employees on personal leave's absence without pay will have no more right to employment than they would if they were working. For example, if a layoff, position elimination or change of position status occurs while a staff is on leave, this will still affect the staff on leave the same as if they were working.

#### **5.08.01 Concurrent Personal and Family/Medical Leave**

Any leave taken under this provision that qualifies as leave under the state and/or federal Family and Medical Leave Acts will be counted as family/medical leave and charged to your entitlement of 12 workweeks of family/medical leave in a 12-month period.

#### **5.09 Military Leave**

Employees who wish to serve in the military and take unpaid military leave should contact the HR Manager for information about their rights before and after such leave. You are entitled to reinstatement upon completion of military service, provided you return or apply for reinstatement within the time allowed by law. This Military Leave is extended to members of the National Guard of other states who leave private employment in California as a result of being called to military service.

Employees who work at least twenty (20) hours per week and are spouses of individuals in the military may take up to ten (10) days per year of unpaid leave from work while the military spouse is on leave from active duty deployment in an area of military conflict. You must notify your supervisor of your intention to take leave within two (2) business days of receiving notice of the leave.

#### **5.10 Jury Duty and Witness Leave**

An employee required to attend a mandated court appearance which is related to Bill Wilson Center OR to serve on a jury shall be granted paid time off. Other mandated court appearances will be unpaid. The employee must notify his/her supervisor as soon as he/she receives a summons, subpoena or notice to serve on a jury or as a trial witness. The employee shall receive his/her normal salary, less any fee paid for serving on jury duty or court appearance. If the employee is excused from service on any day or days, or is released from jury duty at a time at which it would be possible to perform at least two (2) hours of work, during the normal working hours, the employee shall return to work to finish his/her shift.

Employees serving on jury or appearing in court must submit to the HR Manager the certificate of the time served, issued by the Court. Documentation and any reimbursement shall go to the Center. It is the employee's responsibility to provide documentation in order to receive compensation for the period. There will be a ten (10) working day limit to jury duty and court appearance leave, however, no exempt employee's weekly salary will be reduced for any workweek in which any work is performed while also serving on a jury.

## **5.11 Time Off for Voting**

If an employee does not have sufficient time outside of working hours to vote in an official state-sanctioned election, the employee may take off enough working time to vote. Such time off shall be taken at the beginning or the end of the regular working shift, whichever allows for more free time, and the time taken off shall be combined with the voting time available outside of working hours to a maximum of two hours combined. Under these circumstances, an employee will be allowed a maximum of two hours of time off during an election day without loss of pay. When possible, an employee requesting time off to vote shall give his or her supervisor at least two days' notice.

## **5.12 Volunteer Firefighters and Peace Officers**

No employee shall be disciplined for taking time off to perform emergency duty as a volunteer firefighter, peace officer, or emergency rescue personnel. You are also eligible for unpaid leave for required training (up to 14 days annually). If you are an official volunteer firefighter, please alert your supervisor that you may have to take time off for emergency duty. When taking time off for emergency duty, please alert your supervisor before doing so when possible.

Volunteer members of the California Wing of the Civil Air Patrol may also take a temporary unpaid leave of absence up to ten (10) days per year to respond to an emergency operational mission.

## **5.13 Domestic Violence or Stalking Leave**

Employees who are victims of domestic violence, sexual assault or stalking are eligible for unpaid leave in certain circumstances. You may request leave if you are involved in a judicial action, such as obtaining restraining orders, or appearing in court to obtain relief to ensure your health, safety, or welfare, or that of your child. You may also request leave to seek medical attention, counseling, or to obtain other services such as making shelter arrangements.

You should provide notice (if able, otherwise as soon as safely able to) and certification of your need to take leave under this policy. Certification may be sufficiently provided by any of the following:

- \* A police report indicating that the employee was a victim of domestic violence;
- \* A court order protecting or separating the employee from the perpetrator of an act of domestic violence, or other evidence from the court or prosecuting attorney that the employee appeared in court;  
or
- \* Documentation from a medical professional, domestic violence advocate, health-care provider, or counselor that the employee was undergoing treatment for physical or mental injuries or abuse resulting in victimization from an act of domestic violence.

Bill Wilson Center will, to the extent allowed by law, maintain the confidentiality of an employee requesting leave under this provision and will not retaliate or discriminate against the employee for exercising their rights to this leave.

Reasonable accommodation will be evaluated if employee requires changes in the workplace to ensure safety. This could include changing locks, changing phone number or work shift or transferring to a different program/location if available, or help with keeping a record of what happened. BWC can ask you for a signed statement certifying that your request is for a proper purpose, and may also request proof showing your need for an accommodation.

The length of unpaid leave an employee may take is limited to 12 weeks that does not exceed or supplement leave provided for in the federal Family and Medical Leave Act of 1993. Any accrued PTO must be used in lieu of unpaid time. Requests and conversations related to Domestic Violence leave will remain confidential.

## 5.14 Victims of Crime Leave

An employee who is a victim or who is the family member of a victim of a violent felony or serious felony may take unpaid time off from work under the following circumstances:

- The crime must be a violent or serious felony, as defined by law; and
- You must be the victim of a crime, or you must be an immediate family member of a victim, a registered domestic partner of a victim, or the child of a registered domestic partner of a victim.

An immediate family member is defined as: a spouse, child, stepchild, brother, stepbrother, sister, stepsister, mother, stepmother, father or stepfather.

A registered domestic partner means a domestic partner who is registered in accordance with California state law.

The absence from work must be in order to attend judicial proceedings related to a crime listed above.

Before you are absent for such a reason, you must provide documentation of the scheduled proceeding. Such notice is typically given to the victim of the crime by a court or government agency setting the hearing, a district attorney or prosecuting attorney's office or a victim/witness office.

If advance notice is not possible, you must provide appropriate documentation within a reasonable time after the absence.

Any absence from work to attend judicial proceedings will be unpaid, unless you choose to take paid time off.

## 5.15 School Activities

Employees who are parents, step-parents, foster parents, guardians, or grandparents with custody of one or more children enrolled in a California public or private school, kindergarten, in grades 1 through 12, or are in a licensed child care facility are entitled to take up to 40 hours of unpaid leave per year (up to 8 hours per month) to take part in any of their child(ren)'s activity sponsored, supervised, or approved by the school, the school board, or child care facility. If both parents work for the Company, only one parent may take the time off, unless the Company approves both parents taking time off simultaneously.

Additionally, parents may take this job-protected time off to find, enroll, or re-enroll their children in a school or with a licensed child care provider. Employees may take time off to address a school or child care provider emergency, due to one of the following reasons:

- The school or child care provider has requested the child be picked up or it has an attendance policy (excluding planned holidays) that prohibits the child from attending or requires the child be picked up
- Behavioral or discipline problems
- Closure or unexpected unavailability of the school or child care provider, excluding planned holidays
- A natural disaster, including but not limited to, fire, earthquake or flood.

Parental time off may not exceed eight hours in any calendar month. To be eligible for parental time off, an employee must obtain written verification from the school stating that attendance or participation in the school activity. For scheduling purposes, the employee's supervisor must be notified at least one week before the date of the school activity. If both parents are employed at Bill Wilson Center, the first employee to request such leave will receive the time off. The other parent will receive the time off only if the leave is approved by his or her supervisor. An employee may choose to request PTO time.

If an employee who is the parent or guardian of a child facing suspension from school is summoned to the school to discuss the matter, the employee should alert his or her supervisor as soon as possible before leaving work. No discriminatory action will be taken against an employee who takes time off for this purpose.

## **5.16 Organ Donor/Bone Marrow Transplant Leave**

Bill Wilson Center allows employees with at least 90 days of service to take up to five (5) days of paid leave for bone marrow donation, and up to 60 days of paid leave for organ donation (California Labor Code Section 1508). Bill Wilson Center will maintain the employee's group health coverage during the leave if the employee is covered at the beginning of the leave.

Under most circumstances, upon return from organ donor/bone marrow transplant leave, an employee will be reinstated to his or her original job or to an equivalent job with equivalent pay, benefits, and other employment terms and conditions. However, an employee has no greater right to reinstatement than if he or she had been continuously employed rather than on leave. For example, if an employee on organ donor/bone marrow transplant leave would have been laid off had he or she not gone on leave, or if the employee's job is eliminated during the leave and no equivalent or comparable job is available, then the employee would not be entitled to reinstatement. In addition, an employee's use of organ donor/bone marrow transplant leave will not result in the loss of any employment benefit that the employee earned before using leave.

This leave is in addition to FMLA and CFRA leave and is not to be counted against FMLA or CFRA entitlement. The leave will not be considered as a break in service for purposes of the employee's right to salary adjustments, sick leave, vacation, annual leave, or seniority. Thus, the employee will continue to accrue paid leave and seniority during the leave period.

If, at the time the employee takes the leave, the employee has any accrued but unused paid time off, any accrued paid time off will be credited against the 5-day bone marrow transplant leave or up to two weeks of for organ donor leave. Leave under this provision can be taken intermittently.

Bill Wilson Center requires the employee to provide written documentation from a medical provider that the employee is donating an organ or bone marrow and that there is a medical necessity for the donation in order to verify the employee's right to the leave. For additional information about eligibility for this leave, contact the CEO or designee.

## **5.17 Professional Development**

Some employees may need to attend training programs, seminars, conferences, lectures, meetings, or other outside activities for the benefit of Bill Wilson Center. Attendance at such activities requires the written approval of the CEO. Any travel arrangements required for such activities will be approved by the CEO and made by the Executive Assistant. Employee attendance at authorized outside activities will be considered hours worked and employees will be compensated in accordance with normal payroll practices.

Bill Wilson Center promotes professional development among its staff. Training requirements for staff are outlined in the Training Policies and Procedures. Supervisors will provide employees with professional development/training guidance at hire, quarterly and annually. Bill Wilson Center will provide required trainings at no charge to the employee (i.e., Relias Learning Online System, free external trainings, in-house trainings, etc.).

While Bill Wilson Center does not provide reimbursement for paid trainings, registration fees, licensing/certification fees, renewal fees, etc., the agency may, on a case by case basis, approve reimbursement for these items. An employee's request would be reviewed and approved by their supervisor and the request, along with an itemized accounting of amount requested, must be submitted to the Chief Program Officer who will then make a funding recommendation to the CEO for final approval PRIOR to any payment being made. Final approval will be based on agency and/or program needs, priorities and initiatives as well as availability of funds.

Training designated as job-essential by the supervisor or required by the Training Policies and Procedures will be paid at regular or overtime rates as applicable.

## **5.18 Workers' Compensation**

Bill Wilson Center, in accordance with state law, provides insurance coverage for employees in case of work-related injury. The workers' compensation benefits provided to injured employees may include:

- \* Medical care;
- \* Cash benefits, tax free, to replace lost wages; and
- \* Vocational rehabilitation to help qualified injured employees return to suitable employment.

To ensure that you receive any workers' compensation benefits to which you may be entitled, you will need to:

- \* Immediately report any work-related injury to your supervisor AND the HR Manager or CEO or designee;
- \* Seek medical treatment and follow-up care if required (follow procedures for use of Medical Provider Network when feasible);
- \* Complete a written Employee's Claim Form (DWC Form 1) and return it to the HR Manager; and
- \* Provide the Company with a certification from your health care provider regarding the need for workers' compensation disability leave, as well as your eventual ability to return to work from the leave.

Upon submission of a medical certification that an employee is able to return to work after a workers' compensation leave, the employee under most circumstances will be reinstated to his or her same position held at the time the leave began, or to an equivalent position, if available. An employee returning from a workers' compensation leave has no greater right to reinstatement than if the employee had been continuously employed rather than on leave. For example, if the employee on workers' compensation leave would have been laid off had he or she not gone on leave, or if the employee's position has been eliminated and no equivalent or comparable positions are available, then the employee would not be entitled to reinstatement.

An employee's return depends on his or her qualifications for any existing openings. If, after returning from a workers' compensation disability leave, an employee is unable to perform the essential functions of his or her job because of a physical or mental disability, the Company's obligations to the employee may include reasonable accommodation, as governed by the Americans with Disabilities Act. Workers' Compensation leave shall run concurrently with FMLA/CFRA leave.