

Employee Handbook Template

This resource is not all-inclusive on the topic(s) presented and not intended as legal advice. Please note, federal, state, and local laws and regulations may vary regarding the issues presented. We encourage you to review local laws and regulations and seek legal counsel when implementing new HR policies and procedures.

Our organizations are nothing without our people, as staff truly are the cornerstone of all our work. TREC has provided the following customizable template for creating or revising your organization's employee policies and procedures to create a comprehensive employee handbook.

Purpose and Benefits of an Employee Handbook

The purpose of an employee handbook is to be clear and transparent by setting and managing expectations regarding the "employer-employee relationship." An employee handbook can be a valuable communication resource for the employer and the employee. It provides an organizational context, especially for new employees, related to the organization's history, mission, values, policies, procedures and benefits in a written format. It is also viewed as a means of protecting the organization against discrimination or unfair treatment claims. It is an easily accessible guide to the organization's policies and practices as well as an overview of the expectations of management.

One of the major benefits of a well-written and communicated employee handbook that is consistently followed is that it can be a significant tool in minimizing potential liability in a employer-employee relationship that becomes problematic. The key to an employee handbook minimizing potential liabilities against for example, a wrongful discharge lawsuit, is that the guidelines, policies, and procedures are consistently followed—especially those guidelines and procedures regarding disciplinary processes.

Other benefits of a well-written and consistently followed handbook are:

- Employees are aware of leadership's expectations and often "self-manage" within the stated guidelines.
- Removes the burden of individual managers or supervisors having to handle each employee concern or issue on a case-by-case basis, thereby saving time and reducing headaches for managers.
- Consistent administration of the policies and procedures outlined in a handbook conveys a sense of fairness to employees and helps reinforce the culture of the organization.

If supervisors and managers within your organization are unwilling to consistently apply the policies and procedures outlined in your employee handbook, it may be better for your organization to *not* have published and communicated employee policies and procedures. A jury or judge will review an organization's published handbook and compare what the organization states in writing are its policies and procedures against what actually occurred with an employee. If the two are not aligned in a lawsuit or claim by an employee, the organization has put itself at risk. Stated policies and procedures need to be followed by *all* employees, including the leaders of the organization.

As an employer you should require every employee to provide a [written acknowledgment](#) of having received the handbook. We've included a (sample) signature section on the last page. Such acknowledgment should be saved in the employee's personnel file as a way for the employer to establish that the employee was made aware of the policies.

By no means should the handbook be construed as an employment agreement, which may affect the employer's at-will status. Many states have an "employment-at-will" regulation that basically is the right of the organization to terminate an employee at any time for any reason and the right of the employee to terminate his/her employment at any time for any reason.

Getting Started - Developing Your Employee Handbook

Developing a comprehensive employee handbook is a proactive step in becoming a professionally managed, entrepreneurial organization. It sets boundaries and expectations related to the desired culture and values of the organization. Your handbook is not just about restrictions and limits.

To develop an employee handbook for your organization, the following steps may be useful:

- Establish a small group or team to create or revise and implement an employee handbook. Depending upon the size of your organization and your culture, we encourage you to populate your team with a cross-section of staff. Have the team review this template or the table of contents, deleting those items not applicable to the organization. This will likely occur in the benefits section of the template, as well as some of the miscellaneous policies.
- Brand the template with your logo and other information to make it look and feel like other documents representing your organization. Edit the footer as needed, including the date of the most recent revision.
- Now, add any missing topics to the table of contents for the handbook. Your organization may have a sabbatical policy or catastrophic leave policy you will want to include.
- Assign major topic areas to team members and have them take a first pass at revising the template to reflect current guidelines or policies for each topic.

- The team should establish some internal review process of the revisions and additions to the handbook so individuals do not get too far along without input and comment from other team members.
- Make sure leaders in the organization have read and approved a draft version of the handbook before moving to a final version.
- Create a close-to-final version of the handbook. Have a team member review/edit the entire handbook looking for continuity in writing styles, typos, misspellings, grammar, pagination, etc.
- Provide this close-to-final edited version to legal counsel for review. While it may be tempting to ask an attorney “friend” to review this document pro bono, TREC recommends having all employment-related documents reviewed by paid counsel.
- Once legal counsel and the executive leadership of the organization have approved the document, we suggest the handbook then be presented to the Board of Directors for adoption.
- Determine how the handbook will be published and create a communication and implementation plan. Have frequent discussions with your staff on this important subject. Some organizations then publish the handbook on their intranet. Paper copies need to be available to all employees if requested or if they do not have access to the intranet. All managers and supervisors should be trained and well oriented to the content of the handbook before it is widely communicated throughout the organization.
- Once supervisors and managers are trained, an “all-organization” communication meeting is often held, led by the executive director. This ensures everyone hears the same thing at the same time. If the organization is implementing a new policy that is anticipated to create some potential concerns or issues among the employees, this should be reviewed among leadership of the organization prior to any communication.
- For example, if the organization is going to implement a drug and alcohol policy for the first time, and historically alcohol or even drugs have been tolerated at the organization’s facility, a clear “case for change” needs to be developed to provide the necessity and rationale for the new policy. Be thoroughly prepared on how to respond to any “push back” from employees.
- Update the handbook as necessary. Designate a team member to be responsible for updating the handbook as content is changed or added. For each update ensure a revision date is stated on the front to avoid confusion later.
- NOTE: There are two additional considerations when crafting a revised or new employee handbook.
- For organizations with employees working in multiple states or provinces, there may be variations of key employment laws regarding discrimination, minimum wage, overtime requirements. Rather than increase the length of the handbook by adding all of the state variations into the document, the

organization can create addendums for each state that is issued to the employees within that state.

- Often the procedures outlined in a handbook begin to overlap with operational procedures. If your organization has developed a significant number of operational procedures, you may want to create a separate operations manual rather than include them in the employee handbook.

A few notes about this template:

- It is very likely there are sections in this template that are either not applicable to your organization or not of enough significance to warrant notation. In part this is because this template is designed to serve medium to large-sized environmental non-profits. If you are a very small environmental organization or are just beginning to formalize internal policies and procedures, you may find some sections irrelevant. Delete these as desired.
- This template was drafted with US organizations in mind, and to the best of our knowledge, represents current best practice on upholding US law and custom. A separate template created for Canadian organizations can be found on TREC's website.
- In the benefits category, there may be information that does not apply to your organization. It is very simple to delete the areas that are not applicable to your organization. However, before deleting anything, think about whether it may have applicability in the future. If it does, it may be prudent to leave the section in place so guidelines are already in place in the event the need for the policy arises. Also, don't hesitate to add employee guidelines or policies that are specific for your organization and work environment. And remember there will be things that are specific to your state and/or municipality.
- Some of the language in this template can appear overly formal or replete with "legalese". One of the purposes of an employee handbook is to provide for a means of protecting your organization against discrimination or unfair treatment claims. Therefore, there are sections in an employee handbook, e.g., performance improvement, Family and Medical Leave, etc., where the "legalese" serves the employer.
- Throughout the template there are **[bracketed]** phrases and statements. Some of these are placeholders for your organization's name to be inserted with a global search and replace. Others are inserted as side notes providing further explanation of the policy or providing alternatives to the policy.
- Remember this document is primarily a communication tool that clearly spells out the employer-employee relationship for your organization. If it reflects your values and culture it will be much more effective.

Table of Contents

Employee Handbook.....	7
Introduction to [Your Organization Name].....	7
Welcome Letter.....	7
Introduction	8
[Your organization’s name] Vision, Mission and Goals	8
[Your organization’s name] History.....	8
Purpose of the Employee Handbook.....	8
At-Will Employment.....	8
Employment Policies and Procedures	Error! Bookmark not defined.
Equal Opportunity Policy.....	9
Prohibition of Harassment	9
Recruitment	10
Announcement of New Positions.....	10
Employee Selection and Development	11
Interview, Travel and Moving Expenses.....	12
Conditions of Employment	13
Introductory Period Policies	13
Introductory period.....	14
Introductory Period Procedures.....	14
Attendance Policies and Procedures.....	14
Standards of Personal Behavior	15
Illegal Drug Abuse/Alcohol Abuse	15
Smoking.....	16
Statement on Confidentiality	17
Outside Employment.....	17
Political Activities	17
Conflicts of Interest.....	17
Performance Feedback	17
Performance Improvement.....	18
Termination.....	21
Grievance Procedure.....	23
Employment Disputes.....	24
Employee Safety.....	24
Return to Work After Serious Injury or Illness	24
Employment Status and Classifications.....	25
Compensation	25
Equal Pay	25
Job Descriptions	25
Reclassification of Jobs	26
Workday.....	26
Payday	26
Pay Advances.....	26
Overtime Compensation	27
Work Beyond Regular Hours--Exempt Employees	27
Compensatory time off Sample Policy #1	27

Compensatory time off Sample Policy #2	27
Reimbursements	28
Salary Administration	29
Payroll Deductions	29
Employee Benefits.....	30
Insurance.....	30
Retirement--401(k)/403(b) Program.....	30
Vacation	31
Sick Days.....	33
Catastrophic Leave	34
Terms and Conditions	34
Limits on Leave Donation	35
Donated Time Not Used	36
Eligibility to Participate.....	36
Conditions for Making Leave Donations.....	36
Calculating Donated Leave	36
Solicitation of Donations	36
Leave of Absence and Military Leave	37
Return to Work.....	37
Benefits during Approved Leave of Absence.....	38
Medical/Family Leave	38
Return from Leave.....	39
Bereavement Leave.....	40
Jury Duty	40
Voting	40
Travel Reimbursement	41
Use of Rental Car on [Your Organization Name] Business	42
Conferences and Meeting	42
Miscellaneous Policies	42
Confidentiality	42
Software Usage Policy	43
Enforcement	44
Telecommuting/Virtual Offices	44
Gratuities to Government Employees	45
Employee Privacy	46
Kitchen/Break Room.....	46
Emergency Closings.....	46
Mail and Shipping.....	47
EMPLOYEE ACKNOWLEDGMENT	47
APPENDIX.....	48
APPENDIX A – Health Insurance Plan	48
APPENDIX B – Prescription Drug Plan.....	48
APPENDIX C – Dental Plan	48
APPENDIX D – Vision Care Plan	48

[insert your organization’s logo]

Employee Handbook

The Employee Handbook has been developed to provide guidelines for employees of **[Your Organization Name]**. The Employee Handbook is not intended to be (nor should it be considered by you to be) a contract of employment. The handbook may be changed from time to time. When that happens, **[Your Organization Name]** will, if possible, try to give its employees advance notice of such changes.

The policies and procedures are intended to be guides to management and to you as an employee and are merely descriptive of suggested procedures to be followed. No policy is intended as a guarantee of continuity of benefits or rights. No permanent employment or employment for any term is intended or can be implied from any statements in this handbook.

[Your Organization Name]

[Your Organization Address]

[Your Organization City, State and Zip Code]

[Enter date, Month, Day and Year]

Introduction to [Your Organization Name]

Welcome Letter

Welcome to **[Your Organization Name]**! We are pleased to have you with us and hope that you find your new job rewarding and challenging. **[Your Organization Name]** is a growing organization, and we feel that all of us have the opportunity to benefit. We want to maintain the benefits of our current environment as we expand and grow the organization over the coming years.

To achieve our mission we must employ the best people. As a member of the **[Your Organization Name]** team, you are critical to our success. Through your success we can reach our goals.

[Your Organization Name] strives to create an exciting, challenging and rewarding work environment that allows you to flourish. We want you to build a long and successful association with **[Your Organization Name]** and be a happy and productive member of our team. Through your dedication, creativity, perseverance and efforts, **[Your Organization Name]** will continue to grow.

Once again, welcome to **[Your Organization Name]**, and our best wishes for success. We appreciate your confidence in our future. Let's grow together.

Regards,

[Executive Director Name]

[Title]

Introduction

[Your organization's name] Vision, Mission and Goals

[Provide the organization's vision, mission and goals here. Include long and short-term goals. Try to be as specific as possible. It is important that all employees understand clearly what the organization is trying to achieve.]

[Your organization's name] History

[Provide a short organizational history here. This can be as long as you would like it. New employees would like to know as much as possible about the organization for which they are working.]

Purpose of the Employee Handbook

The Employee Handbook has been developed to provide guidelines for employees of **[Your Organization Name]**. The policies and procedures in this handbook are not intended to be contractual commitments by **[Your Organization Name]**, and employees shall not construe them as such.

[Your Organization Name] reserves the right to revoke, change, or supplement these guidelines at any time without notice. Such changes shall be effective immediately upon approval by the Board of Directors and management unless otherwise stated.

At-Will Employment

[Your organization name] is an employment at-will organization, which means either an employee or **[Your organization name]** may terminate the employment relationship at any time with or without notice and with or without cause. No supervisor or manager within **[Your organization name]** has the right to change this relationship other than the Executive Director, and any such change by the Executive Director must be in writing.

No policy is intended as a guarantee of continuity of benefits or rights. No permanent employment or employment for any term is intended or can be implied by statements in this handbook.

Equal Opportunity Policy

[Your Organization Name] is an Equal Opportunity employer.

[Your organization name] will endeavor to provide equal opportunity to all qualified employees and applicants for employment. All aspects of employment will be governed on the basis of merit, competence, and qualifications and will not be influenced in any manner by race, color, religion, sex, age, national origin, disability, marital status, sexual orientation, political affiliation, or any other basis prohibited by law. All decisions made with respect to recruiting, hiring, and promotions for all job classifications will be based on individual qualifications related to the requirements of the position and the sole discretion of [Your organization name].

Additionally, [Your organization name] makes reasonable accommodation for qualified individuals with disabilities unless it would be an undue hardship.

This policy applies to all employment practices and personnel actions including advertising, recruitment, testing, screening, hiring, selection for training, upgrading, transfer, demotion, layoff, termination, rates of pay and other forms of compensation or overtime.

Prohibition of Harassment

Harassment

It is the policy of [Your organization name] that all employees are able to work in a setting free from all forms of unlawful discrimination, including harassment on the basis of race, color, religion, gender, national origin, age, or disability, sexual orientation or sexual harassment.

Harassment is severe and pervasive verbal or physical conduct that denigrates or shows hostility or aversion toward an individual because of his/her race, color, religion, gender, national origin, age, or disability, or that of his/her relatives, friends, or associates, and that:

- has the purpose or effect of creating an intimidating, hostile, or offensive working environment;
- has the purpose or effect of unreasonably interfering with an individual's work performance; or
- otherwise adversely affects an individual's employment opportunities.

Harassing conduct includes, but is not limited to, the following: (1) epithets, slurs, negative stereotyping, or threatening, intimidating or hostile acts that relate to race, color, religion, gender, national origin, age, sexual orientation or disability and (2) written or graphic material that denigrates or shows hostility or aversion toward an individual or group because of race, color, religion, gender, sexual orientation, national origin, age, or disability and that is placed on walls, bulletin boards, or elsewhere on the employer's premises, or circulated in the workplace.

Any intentional harassment is considered to be a major violation of **[Your organization name]** policy and will be dealt with swiftly. Actions may include corrective counseling and/or suspension or termination, depending upon the severity of the violation.

[Your organization name] has a policy of not only prohibiting, but also endeavoring to prevent, harassment. Any employee who feels that a violation of this policy has occurred should immediately report the matter to his or her supervisor. If that person is unavailable or the employee believes it would be inappropriate to contact her or his supervisor, the employee should contact the Executive Director or other appropriate management staff. In the case of perceived harassment from the Executive Director, an employee should contact the Board President.

[Your organization name] will promptly investigate all complaints of harassment. When harassment is found to have occurred, timely remedial action will be taken. Actions will/may include action against the party engaging in the harassment and action for the recipient of the harassment. Any violation of this policy will result in immediate corrective action.

Sexual harassment includes unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when (1) submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment, (2) submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual, or (3) such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment.

Recruitment

[Your Organization Name] aggressively recruits to attract top caliber individuals to all levels of the organization. Organizational positions may be filled by either transfer or promotion of existing employees or by new employees who are recruited or who apply. Recruitment may be conducted through advertising, employment agencies, schools, employee referrals or technical referrals. Supervisors/managers should consider the most appropriate method of recruitment for filling departmental positions. All recruitment shall be conducted in an ethical, professional and non-discriminatory manner.

[Your Organization Name] provides equal employment opportunity to all applicants on the basis of demonstrated ability, experience and training.

A list of current openings will be posted to all employees via e-mail.

Announcement of New Positions

The availability of all job openings will be announced within the organization prior to outside recruitment for any position. The job posting giving job title, class, department, job functions and qualifications will be posted via e-mail to all employees.

An applicant must have at least **[fill in the number of months required]** months experience in his or her current position before applying for another organization position. All present employees are encouraged to review the requirements for each position and apply for those positions in which they are interested. All applications will be given the same consideration as outlined in the **[Your Organization Name]** recruitment policy.

Employee Selection and Development

[Your Organization Name] provides equal opportunity to all applicants on the basis of demonstrated ability, experience, training, and potential. Qualified persons are selected without prejudice or discrimination as stated in the organization's Equal Opportunity Policy.

The employment posting, initiated by the supervisor/manager, will define the job-related tasks and qualifications necessary to fulfill the position. The defined tasks and stated qualifications will be the basis for screening applications. The supervisor/manager will conduct structured initial interviews limited to job-related questions to assess each candidate's experience, demonstrated ability and training. The telephone may be used for these initial interviews.

Recruiting is only one part of continued employee development, which is a five-part process designed to help retain good workers. The employment development process includes (1) recruiting, (2) interviewing, (3) hiring, (4) orientation/training and (5) feedback and evaluation.

Recruiting — Recruiting involves a variety of factors:

- Developing a job description and creating a concise job announcement from the job description
- Finding candidates through
- Employee and Board referral
- Job boards
- Advertising in trade magazines and the general media
- Executive recruiters

Interviewing — Interviewing also involves a variety of factors:

- Initial screening of resumes and cover letters
- Telephone interview(s) to do an initial screening and to determine if candidates meet the job description
- Initial one-on-one interviews
- Follow-up interviews with search committee and peers
- Checking references and backgrounds
- Gaining the consensus of interviewers or search committee to hire or not to hire

Before extending an employment offer and upon the applicant's prior agreement, at least three applicant references may be checked. Inquiries are to be made in a professional manner requesting only factually verifiable and job-related information. The reference data is used only as supplemental information for the hiring decision.

Interview, Travel and Moving Expenses

The Executive Director, in consultation with the Board if needed, may authorize the payment of travel expenses for out-of-town applicants only when funds are available and when no local candidates for the position appear to have the same level of experience, training, and skill as the out-of-town candidate. The Executive Director retains absolute discretion to determine whether funds are available and whether any local candidate has the same level of experience, training, and skill as the out-of-town candidate. Once employment is offered to an out-of-town applicant, the Executive Director, and if needed, the Board may authorize payment to help offset some of the moving expenses.

Hiring — Once the manager has made a decision to make the offer and has confirmed key terms, the next step involves making the verbal and written offer culminating in the employee's first day as a member of the [Your Organization Name] team. Following employment, the references and interview ratings must be retained for up to one year and then may be destroyed.

After candidate interviews, verification of employment history and reference inquiries, the hiring manager is responsible for the employment offer. After the verbal offer has been made and the candidate has agreed to the essential terms of the offer (typically the position, employee classification, salary or rate, and the starting date), a written offer will be prepared and submitted to the candidate in person or by mail confirming the verbal offer and will include the essential terms of the verbal offer as agreed to by the candidate. The candidate will be required to sign and date an acceptance of the written offer that will state as follows:

"The undersigned accepts the above employment offer and agrees that it contains the terms of employment with [Your Organization Name], and that there are no other terms express or implied. It is understood that employment is subject to verification of identity and employment eligibility and may be terminated by [Your Organization Name] at any time for any reason."

The verbal or written offer must never express or imply that employment is "permanent," "long-term," of a specific duration, or words of similar meaning. An exception may be made where a temporary position of known duration is to be filled. Employment may be made contingent upon certain job-related factors, such as obtaining a specific state or federal license when appropriate or desirable.

After the candidate has accepted the employment offer, he or she will be required to provide documentation of identity and employment eligibility in accordance with US Federal law. The US Department of Homeland Security Form I-9 shall be used for this purpose.

Here is an outline of the hiring process:

- Make verbal offer
- Follow-up with basic offer letter outlining key terms
- Receive acceptance of signed and dated offer letter from new employee
- File paperwork (Internal Revenue Service W2, signed employment agreement and I-9)

Orientation/Training — All new employees will be provided with an orientation briefing, which will be held within their first week of employment with the organization. The orientation is designed to acquaint the new employee with the organization and its policies. Supervisors/managers will be responsible for ensuring the attendance of new employees at the **[Your Organization Name]** orientation sessions.

On the first day of employment, the employee's supervisor/manager is responsible for assisting the employee in completing all check-in and benefit enrollment procedures with the Human Resources and Accounting departments (if applicable, or with the organizational administrator). In addition, the supervisor/manager will ensure that the new employee receives an introduction within the organization and is provided with in-depth information regarding his or her specific role and responsibilities within his or her department.

Here is a brief outline of this first day and week:

- Introduction to coworkers on Day 1
- Supervisor/manager identifies specific roles and responsibilities of employee on Day 1
- Supervisor/manager has office space, computer, phone, supplies, keys, etc., ready for the new employee on Day 1
- Supervisor/manager takes employee on tour of office facilities on Day 1
- Supervisor/manager reviews [Your Organization Name] history, services, programs, constituents, etc., within the first week of employment

Feedback and Evaluation

All new hires enter into a 90-day introductory period their first three months of employment. During the introductory period they are provided feedback on performance and formally evaluated near the end of the introductory period to determine whether or not employment is to continue.

Conditions of Employment

Introductory Period Policies

All newly hired regular employees shall complete a three-month introductory period. Health insurance and dental benefits shall be made available to the new employee on the _____ day of the month following the date of hire. **[List all available benefits to the new-hire during his/her introductory period.]** The Cafeteria Plan is available at the beginning of the month following the successful completion of the probationary period.

Introductory period employees shall accrue and be entitled to utilize paid sick leave during the introductory period. During the introductory period, the employee shall accrue vacation leave but shall not be entitled to take paid vacation until the completion of the introductory period.

Introductory period

Employees are employed at-will and the successful completion of the introductory period does not affect the employee's at-will status. This means either the employee or **[Your organization name]** can end the employment relationship at any time for any reason.

Introductory Period Procedures

Within the final month of the introductory period of employment, each introductory period employee shall be evaluated by her/his supervisor. If there are issues with the performance of the employee, feedback will be given early on during the introductory period. If the evaluation determines that the probationary period employee has performed satisfactorily, a written notice of satisfactory completion of the introductory period shall be placed in his/her personnel file and the introductory period concluded.

If the evaluation determines that the employee has not performed satisfactorily, the supervisor may dismiss the introductory period employee or may request authorization from the Executive Director to extend the introductory period up to _____ months beyond the employee's three-month initial introductory period. If an extension of the introductory period is authorized by the Executive Director, a written plan for improvement must be drafted. The plan shall clearly state that the employee's introductory period status has been extended under the same terms as the original introductory period status; identify the ending date for the extended introductory period; include specific, explicit changes needed and inform the employee that no further extension of introductory period status will be available.

An employee on extended introductory period status will be evaluated by his/her supervisor within the final month of the extension period. The supervisor will also meet with the employee during the extended introductory period to evaluate progress on the written plan for improvement. If the employee has achieved satisfactory performance, a letter ending the employee's introductory period status shall be placed in his/her personnel file. If the employee has not achieved satisfactory performance, the supervisor shall terminate the employee's employment.

Attendance Policies and Procedures

All employees are expected to be at work on time every day they are scheduled to work. Regular and consistent attendance and timeliness is an essential function of your job.

Attendance records are maintained for all employees. Each non-exempt employee (those paid on an hourly basis and eligible for overtime) is responsible for maintaining a daily record of hours worked using **[Your organization's name]** official timesheet, which shall be submitted to payroll at the end of the pay period.

Employees unable to attend work due to illness or unforeseen circumstances must call in to report their absence no later than the first hour of their normal workday.

All planned absences must be approved in advance by the employee's supervisor. Having obtained such approval, no additional call-in is required.

Standards of Personal Behavior

Employees are expected to maintain the highest standards of personal behavior. No harassment of other employees, volunteers and constituents will be tolerated. All employees shall speak and conduct themselves in a manner conducive to the achievement of the organization's mission.

Illegal Drug Abuse/Alcohol Abuse

This policy is implemented because we believe that the impairment of any **[Your Organization Name]** employee due to his or her use of illegal drugs or due to alcohol abuse is likely to result in the risk of injury to other employees, the impaired employee, or to third parties, such as volunteers or guests. Moreover illegal drug abuse adversely affects employee morale and productivity.

“Impairment” or “being impaired” means that an employee’s normal physical or mental abilities or faculties while at work have been detrimentally affected by the use of illegal drugs or alcohol.

The employee who begins work while impaired or who becomes impaired while at work is guilty of a major violation of **[Your Organization Name]** rules and is subject to immediate/timely and severe disciplinary action. Severe disciplinary action can include suspension, dismissal or any other penalty appropriate under the circumstances.

Likewise the use, possession, transfer or sale of any illegal drugs on **[Your Organization Name]** premises or in any **[Your Organization Name]** storage area or work site is prohibited. Employees who violate this rule are subject to severe disciplinary action. In all instances disciplinary action to be administered shall be at the sole discretion and determination of the organization.

When an employee is involved in the use, possession, transfer or sale of illegal drugs in violation of this policy, the organization may notify appropriate authorities. Such notice will be given only after such an incident has been investigated and reviewed by the employee’s supervisor and the Executive Director. **[Your Organization Name]** is aware that illegal drug abuse is a complex health problem that has both physical impact and an emotional impact on the employee, his or her family, and social relationships. A drug abuser is a person who

uses illegal drugs, as defined above, for nonmedical reasons, and this use affects job performance detrimentally or interferes with normal social intercourse at work. Illegal drug abuse is both a management and a medical problem.

A supervisor/manager who suspects a drug or alcohol abuse case should discuss the situation immediately with his or her supervisor/manager. Because each case is different, the handling and referral of the case must be coordinated with the supervisor/manager and the Executive Director.

Applicants who have a past history of substance abuse and who have demonstrated an ability to abstain from the substance, or who can provide medical assurance of acceptable control, may be considered for employment as long as they are otherwise qualified for the position for which they are applying.

Management has chosen to adopt an alcoholic beverage policy in keeping with the concern for and the risks associated with alcohol use. Alcoholic beverages shall not be served or used on **[Your Organization Name]** premises at any time. Alcoholic beverages shall not be used in conjunction with any **[Your Organization Name]** meeting.

Social activities held off-premises and paid for on a personal basis are not affected by this policy. If management considers it appropriate, beer and wine may be served at **[Your organization name]**-sponsored events held off-premises and for purely social reasons. The service must be managed in good taste and with good judgment.

The organization is concerned with its employees' privacy, especially when matters regarding medical and personal information are involved. As long as the information is not needed for police or security purposes, the organization shall maintain employee medical and personal information in confidence and release this information to authorized **[Your Organization Name]** personnel on a "need to know" basis. An exception to this policy is when the employee signs a release for the transfer of such information on forms acceptable to the organization to designated persons or agencies.

Nothing contained in this section shall eliminate or modify **[Your Organization Name]**'s right to terminate any employee at any time for any reason.

Smoking

No smoking will be allowed in the office area or on the premises at any time. This policy is for the health and safety of all employees.

Statement on Confidentiality

An employee must exercise the utmost discretion in all matters of official business. Any information that has been received by an employee on a confidential basis must be maintained in strict confidence. No confidential records or documents pertaining to official business of the organization will be mailed out or given out to any person or organization without the prior approval of the Executive Director.

Outside Employment

Employees shall be free to obtain/maintain outside employment so long as such outside employment does not conflict with the employee's satisfactory performance of duties for [Your organization name] or compete directly with [Your organization name]'s services or work.

Political Activities

At no time may any employee of [Your organization name] state, imply, or in any way suggest that [Your organization name] holds any position in support of or in opposition to any candidate for public office.

Conflicts of Interest

[Your organization name] seeks to establish and maintain a reputation for the highest standards of fairness and integrity in all its business and program affairs. Consequently, all employees must be particularly sensitive to issues involving conflict of interest. All employees must sign [Your organization name]'s disclosure and conflict of interest form(s) to comply with IRS 990 reporting regulations.

Employees shall disclose any potential conflicts at staff meetings or with his/her supervisor for discussion and resolution. Any unresolved conflicts of interest shall be referred to the Executive Director and/or the Board of Directors for a final decision.

Performance Feedback

It is important for your organization to modify the following to reflect your internal performance feedback process. If you use a rating scale, identify the scale and its meaning and impact. Specify the expected timeframe for formal performance feedback.

This is a critical internal system for your organization, so it must be well thought out and then followed. If annual reviews have never happened, don't say reviews will be annual. However, a key part of the success of this process is holding managers accountable for timely, explicit and robust feedback. Your employees want the feedback.

Contact TREC for guidance and templates related to providing performance feedback.

[Your Organization Name] believes in candid, open, two-way communication. We believe that discussion about performance is essential to employee engagement, productivity and overall organizational success. It is

the supervisor's/manager's responsibility to develop and maintain a work environment in which employees can openly discuss performance and develop plans – such as work plans and professional development.

[Your organization name] encourages frequent, informal feedback as well as formal feedback. The employee will be notified in writing ten days in advance of the performance review date. Also included in the notification will be the time, place, and the discussion topics for the employee to prepare for the review. The employee, as well as the supervisor/manager, is to bring the following to the review meeting:

- Current job description and work plan;
- A summary statement of the progress made toward meeting his or her deliverables or goals;
- Examples of job-related areas demonstrating greatest strengths and identifying areas where additional training is needed;
- Identification and discussion of any behavior adjustments or changes needed;
- An outline of job-related tasks in which the employee can participate to improve performance and results;
- A recommendation of job responsibilities and deliverables or goals to be established for the next six-month period;
- A summary of overall performance.

The supervisor/manager is responsible for establishing a relaxed atmosphere at the performance review and encouraging two-way communication. The discussion should be conducted in a positive manner, in complete privacy and with no interruptions. The supervisor/manager shall verify that the employee is familiar with his or her job responsibilities, previous goals and the appraisal criteria or factors.

At the conclusion of the performance feedback session, the employee will be requested to sign the feedback document verifying that he or she participated in the feedback process. The employee should be encouraged to submit comments about the feedback that will become part of the record. A date for the next feedback session shall be agreed upon and noted on the form. The employee must be given a signed copy of the feedback document. The feedback is then submitted for review by the next level of management and filed in the employee's personnel file. Employees shall be permitted to attach written responses to their evaluations, which will be filed with the evaluation in each employee's personnel file.

Performance Improvement

Performance improvement may be suggested whenever management believes that an employee's performance or behaviors are less than satisfactory or appropriate and can be resolved through adequate counseling. Corrective counseling is completely at the discretion of [Your organization name]'s management.

The organization desires to protect its investment of time and expense devoted to employee orientation and training whenever that goal is in the organization's best interests. The organization expressly reserves the

right to discharge “at-will.” Even if corrective counseling is implemented, it may be terminated at any step at the discretion of management. Management, in its sole discretion, may warn, reassign, suspend or discharge any employee at-will, whichever it chooses and at any time.

The supervisor/manager will determine the course of action best suited to the circumstances. The steps in performance or behavioral improvement are as follows:

Verbal warning — As the first step in correcting unacceptable performance or behavior, the supervisor/manager should review pertinent job requirements with the employee to ensure his or her understanding of them. The supervisor/manager should consider the severity of the problem, the employee’s previous performance feedback, both informal and formal, and all of the circumstances surrounding the particular case. Clearly stating that a written warning, probation or possible termination could result if the problem is not resolved should indicate the seriousness of the performance or misconduct. The employee should be asked to review what has been discussed to ensure his or her understanding of the seriousness of the problem and the corrective action necessary. The supervisor/manager should document the verbal counseling for future reference immediately following the review. The employee should initial the document stating that he or she has participated in the discussion. Initials by the employee do not mean agreement with the content, rather understanding of the issues at hand.

Written warning — If the unacceptable performance or behavior continues, the next step could be a written warning. Certain circumstances, such as violation of a widely known policy or safety requirement, may justify a written warning without first using a verbal counseling. The written warning defines the problem and how it may be corrected. The seriousness of the problem is again emphasized, and the written warning shall indicate that probation, suspension or termination may result if improvement is not observed. Written counseling becomes part of the employee’s personnel file, although the supervisor/manager may direct that the written warning be removed after a period of time, under appropriate circumstances.

Again, the employee is to initial the written warning indicating his or her receipt of the written warning. Initials by the employee do not mean agreement with the content, rather understanding of the issues at hand.

Suspension — A supervisor/manager may suspend an employee with or without pay. Suspension depends upon the nature of the performance or behavioral problems. Suspension is not appropriate, for example, when the performance issue is absenteeism. Instead of a suspension, the organization may call the leave without pay “decision time” when the employee is on a short leave without pay to decide whether or not he/she is going to make the necessary changes to remain employed.

When possible, the supervisor will provide the employee with a written statement of the reasons for suspension and any requirements for reinstatement. A copy of the written notice will be placed in the

employee's file. The employee will have an opportunity to review and sign the document. The employee's signature does not mean agreement with the content, rather understanding of the issues at hand.

Involuntary Termination — The involuntary termination notice is prepared by the supervisor/manager with concurrence of, and review by, the Executive Director. And, in the case of the Executive Director in concurrence of, and review by, the **[Your Organization Name]** Board of Directors. The employee is notified of the termination by the supervisor/manager and will be directed to report to the finance or HR staff, if available, for debriefing and completion of termination documentation. Involuntary termination is reserved for those cases that cannot be resolved by corrective counseling or in those cases where a major violation has occurred, which cannot be tolerated.

The following definitions and classification of violations, for which corrective counseling, performance improvement or other disciplinary action may be taken, are merely illustrative and not limited to these examples. A particular violation may be major or minor, depending on the surrounding facts or circumstances.

Minor violations — Less serious violations that have some effect on the continuity, efficiency of work, safety, and harmony within **[Your Organization Name]**. They typically lead to corrective counseling unless repeated or when unrelated incidents occur in rapid succession. Here are some examples of minor violations:

- Excessive tardiness;
- Excessive absenteeism;
- Unsatisfactory job performance;
- Defacing **[Your Organization Name]** property;
- Interfering with another employee's job performance;
- Failure to observe working hours, such as the schedule of starting time, quitting time, rest and meal periods;
- Performing unauthorized personal work on **[Your Organization Name]** time;
- Failure to notify the supervisor/manager of intended absence either before or within one hour after the start of work, and
- Unauthorized use of **[Your Organization Name]**'s telephone or equipment for personal business.

Major Violations — These more serious violations would include any deliberate or willful infraction of **[Your Organization Name]** rules and may preclude continued employment of an employee. Here are some examples of major violations:

- Fighting on **[Your Organization Name]**'s premises;
- Repeated occurrences of related or unrelated minor violations, depending upon the severity of the violation and the circumstances;
- Any act which might endanger the safety or lives of others;
- Bringing firearms or weapons onto **[Your Organization Name]** premises;
- Deliberately stealing, destroying, abusing, or damaging **[Your Organization Name]** property, tools, or equipment or the property of another employee or visitor;

- Disclosure of confidential [Your Organization Name] information to unauthorized persons;
- Willfully disregarding [Your Organization Name] policies or procedures;
- Willfully falsifying any [Your Organization Name] records;
- Willfully deleting any files and [Your Organization Name] records;
- Employee's conviction for or confession to fraud, misappropriation, embezzlement, theft or the like against [Your Organization Name];
- If Employee performs any intentional act which damages the reputation of [Your Organization Name];
- Employee's conviction for or confession to sexual harassment in any form towards employees of [Your Organization Name] or anyone affiliated with the organization; or
- Employee's excessive absence from performing his duties for [Your Organization Name], as determined by the organization, is [Your Organization Name]'s sole and absolute discretion.

Termination

Terminations are to be treated in a confidential and professional manner by all concerned. The supervisor/department manager, in conjunction with the Executive Director, must assure thorough, consistent and evenhanded termination procedures. This policy and its administration will be implemented in accordance with [Your Organization Name]'s equal opportunity statement.

Terminated employees are entitled to receive all earned pay, including accrued vacation pay in a timely fashion.

Employment with [Your Organization Name] is normally terminated through one of the following actions:

Resignation — voluntary termination by the employee;

Dismissal — involuntary termination for substandard performance or misconduct; or

Layoff — termination due to reduction of the work force or elimination of a position.

Resignation — An employee who wants to terminate employment is expected to give as much advance notice as possible. Two weeks or ten working days is generally considered to be a minimal notice time. If an employee resigns to join a competitor, if there is any other potential conflict of interest, or if the employee refuses to reveal the circumstances or relationship of his or her resignation and the future employer, the manager may require the employee to leave the organization immediately rather than work during the notice period. This is not to be construed as a reflection upon the employee's integrity but an action in the best interests of the organization.

When immediate voluntary termination occurs for the above reasons, the employee may be granted pay "in lieu of notice," the maximum being two weeks of pay based upon a 40-hour workweek at the employee's straight-time rate or salary.

Dismissal — In any case involving an employee dismissal, a release should be signed upon review with [Your Organization Name] legal counsel.

Substandard Performance — An employee may be discharged if his or her performance is unacceptable. The supervisor/manager shall have counseled the employee concerning performance deficiencies, provided direction for improvement, and warned the employee of possible termination if performance did not improve within a defined period of time. The supervisor/manager is expected to be alert to any underlying reasons for performance deficiencies such as personal problems or illegal drug abuse.

The Executive Director must concur in advance of advising the employee of discharge action. Sub-standard performance by Executive Directors is handled by the Board of Directors. Documentation to be prepared by the supervisor/manager shall include reason for separation, performance history, corrective efforts taken, alternatives explored and any additional pertinent information.

Misconduct — An employee found to be engaged in activities such as, but not limited to, theft of [**Your Organization Name**] property, insubordination, conflict of interest or any other activities showing willful disregard of [**Your Organization Name**] interests or policies will be terminated as soon as the supervisor/manager and management team have concurred with the action.

Termination resulting from misconduct shall be entered into the employee's personnel file. The employee shall be provided with a written summary of the reason for termination. No salary continuance or severance pay will be allowed.

Layoff — When a reduction in force is necessary or if one or more positions are eliminated, employees will be identified for layoff after evaluating the following factors:

1. Organization work requirements;
2. Employee's abilities, experience, and skill;
3. Employee's potential for reassignment within the organization; and
4. Length of service.

The immediate supervisor/manager will personally notify employees of a layoff. After explaining the layoff procedure, the employee will be given a letter describing the conditions of the layoff. The letter might include the effect the layoff will have on his or her anniversary date at time of callback – if relevant. The letter could include the procedure to be followed if time off to seek other employment is granted and the organization's role in assisting employees to find other work. After consultation with the employee's supervisor/manager, the employee will follow one of the following procedures:

The employee will be terminated immediately and will receive, in lieu of notice, a severance pay for two weeks unless a different severance package is specified in the termination clause of his/her employment agreement. The payment will be based on a 40-hour workweek at the employee's straight time rate or salary.

Termination Processing Procedures — The supervisor/manager must immediately notify the Executive Director of the termination so that a termination checklist can be initiated. The Executive Director will approve and direct the termination procedure.

On the final day of employment, the supervisor must receive all keys and [Your Organization Name] property from the employee.

The supervisor/manager shall conduct an exit interview with the employee.

The employee will pick up his or her final payroll check at the time of the exit interview or the paycheck will be issued through normal payroll processing. The final check shall include all earned pay, vacation and any expenses due the employee.

Grievance Procedure

[Your Organization Name] recognizes the value of a grievance procedure that provides for the timely review of employee grievances in a fair yet workable manner. A grievance is considered to be any dispute between an employee and the organization that impacts on an employee's ability to perform his or her job.

Although purely personal matters between employees would not ordinarily give rise to a grievance subject to this grievance procedure, any matter that adversely affects an employee's ability to perform his or her job could be the subject of a grievance. Use good individual judgment and common sense as your guide.

An employee may express a verbal grievance to his or her immediate supervisor/manager. If the concern is not resolved to the employee's satisfaction within one week, the employee may put in writing the details of his or her grievance and submit the grievance to the immediate supervisor/manager.

The Executive Director will review the written statement. The employee and his or her supervisor/manager will request a meeting with the Executive Director for resolution of the problem. The problem will be discussed in the presence of the employee and supervisor/manager. Final resolution of the grievance will be made by the Executive Director and discussed with the employee and supervisor/manager.

The decision will be reduced to writing, a copy given to the employee and supervisor/manager, with the original kept by the executive director. A copy will be filed in the employee's personnel file when appropriate.

In the case of a grievance with the Executive Director, the employee will first try to resolve the issues with the Executive Director. If the concern is not resolved to the employee's satisfaction within one week, the employee may put in writing the details of his or her grievance and submit the grievance to the President of the Board.

Employment Disputes

[Your organization will want to adopt its own dispute resolution procedure after talking with an employment lawyer. An example, however, is set forth below]

If mediation is not effective, any dispute or claim that arises out of or that relates to employment with **[Your Organization Name]** or that arises out of or that is based on the employment relationship (including any wage claim, any claim for wrongful termination or any claim based on any employment discrimination or civil rights statute, regulation or law), including tort or harassment claims (except a tort that is a “compensable injury” under workers’ compensation law), shall be resolved by arbitration in accordance with the then effective commercial arbitration rules of the American Arbitration Association by filing a claim in accordance with the Association’s filing rules, and judgment on the award rendered pursuant to such arbitration may be entered in any court having jurisdiction thereof.

Employee Safety

[Your Organization Name] strives to provide its employees with a safe and healthful workplace environment. To accomplish this goal, both management and employees must diligently undertake efforts to promote safety.

All job-related injuries or illnesses are to be reported to your supervisor immediately, regardless of severity. In the case of serious injury, an employee’s reporting obligation will be deferred until circumstances reasonably permit a report to be made. Failure to report an injury or illness may preclude or delay the payment of any benefits to the employee and could subject **[Your Organization Name]** to fines and penalties.

Return to Work After Serious Injury or Illness

As a joint protection to the employee and the organization, employees who have been absent from work because of serious illness or injury are required to obtain a doctor’s release specifically stating that the employee is capable of performing his or her normal duties or assignments. A serious injury or illness is defined as one that results in the employee being absent from work for more than two (2) consecutive weeks or one which may limit the employee’s future performance of regular duties or assignments. (Also see Medical/Family Leave policy. Note that the USA Federal Family and Medical Leave Act which is applicable to organizations with 50 or more employees.)

[Your Organization Name] management shall ensure that employees who return to work after a serious injury or illness are physically capable of performing their duties or assignments without risk of re-injury or relapse.

If the cause of the employee’s illness or injury was job-related, the employee’s supervisor/manager will make every reasonable effort to assign the returning employee to assignments consistent with the instructions of the employee’s doctor until the employee is fully recovered. A doctor’s written release is required following serious illness or injury before recovery can be assumed.

Employment Status and Classifications

The status of an employee is one of three categories:

Regular full-time — An employee who works a minimum 40-hour workweek on a regularly scheduled basis. [Some organizations consider 30 hours or more a week to be full-time when determining benefits eligibility.]

Regular part-time — An employee who works less than a normal workweek on either a regularly scheduled basis or on an irregular basis.

Temporary — An employee hired for a position required for only a specific, known duration, usually less than six months, and who is not entitled to regular benefits. A temporary employee may be full-time or part-time. In addition to the use of this status for temporary secretarial or clerical positions, it applies to students working part-time and those who work during the summer.

All employees are also classified as exempt or nonexempt according to these definitions:

Exempt — Positions of a managerial, administrative, professional or computer technology nature, as prescribed by federal and state labor statutes, which are exempt from mandatory overtime payments. Exempt employees are paid a salary.

Nonexempt— Positions defined by the US Fair Labor Standards Act (FLSA), which are covered by provisions for overtime payments. Nonexempt employees are paid by the hour.

If you are uncertain as to your status or classification, please contact your supervisor/manager.

Compensation

Equal Pay

[Your Organization Name] will not pay wages to any employee at a rate less than the organization pays employees of the opposite sex for work that is substantially equivalent requiring comparable skills.

This policy is to be construed in accordance with applicable federal and state laws and regulations.

Job Descriptions

Job descriptions are available for all positions in the organization. The items included in each position description are the following:

1. Title of position;
2. Status of position (e.g., regular full-time, etc.);
3. Fair Labor Standards Act (FLSA) classification, e.g., exempt or non-exempt;
4. Department – if applicable;

5. Position qualifications (essential qualifications including job experience, skills, and education);
6. Job summary or overview;
7. Assigned duties and responsibilities;
8. Supervisor or manager.

Position descriptions are used to determine employee selection, job requirements, performance criteria, organizational structure, and the relative worth of jobs in relation to each other. Organizational management annually reviews all [Your Organization Name] positions to ensure equity and consistency in our Human Resources system.

Reclassification of Jobs

Any job may be reclassified whenever a change of duties and/or responsibilities make the existing salary no longer applicable. If a position is placed at a higher salary grade as a result of reclassification, employees who are not receiving at least the minimum salary for the new grade shall receive an increase to that level. If a position is placed in a lower salary grade due to reclassification, no employee will receive a reduction in salary as a result of such reclassification. However, if a current employee's present salary is greater than the maximum for the new salary grade, no increases shall be granted until such time as promotion or other change in classification shall once again bring the salary within the position classification range.

Workday

Office hours at [Your Organization Name] are [list your organization's hours].

However the nature of our work sometimes demands workday or workweek hours different than those set forth above. Variation to the schedule will be made or approved by (department) managers.

Employees working at least five hours per day may take a paid lunch break in the course of the workday. Non-work related lunches that extend beyond 30 minutes are unpaid beyond the initial 30 minutes.

All employees are entitled to 10-minute paid rest period for each 4 hours worked.

Employees may be required to attend activities that necessitate travel and overnight stays. The employee shall consider as work time all hours required for travel to and from the destination (i.e., driving or flying time) and all hours spent conducting [your organization name] business. Time spent sleeping or attending to personal needs and preferences shall not be considered work time.

Payday

Paydays will take place on the [list paydays here] each month.

Pay Advances

It is our policy to decline requests for early paychecks or pay advances for personal reasons. However, we understand that there can be extenuating circumstances that might necessitate a request for an early paycheck or pay advance.

Overtime Compensation

Nonexempt (hourly) employees will be paid at the rate of one and one-half times their regular hourly rate of pay for all time worked in excess of 40 hours in any one workweek [*see you specific state overtime regulations*]. Time paid but not worked for holidays or paid leave will not be included when computing the hours worked for overtime payment.

Overtime is never at the employee's discretion. It shall only be incurred and paid at the request of the organization through the employee's supervisor/manager. Supervisors/managers shall ensure that no unauthorized overtime hours are worked. Non-exempt employees will be paid for overtime work performed without approval of the supervisor, but performing such unapproved overtime hours constitutes a violation of [**your organization name**] policy that may result in disciplinary action.

Work Beyond Regular Hours--Exempt Employees

Exempt employees are expected to perform their job duties within their regularly scheduled work hours. If additional hours beyond the regular work month are required on a regular basis, the exempt employee shall request assistance from her/his supervisor to reduce their regular workload to an appropriate level.

[Some organizations offer compensatory time to exempt employees, if your organization does, describe the policy for taking compensatory ("comp") time. Two different examples follow.]

Compensatory time off Sample Policy #1

Compensatory time off is granted to exempt positions. There is no legal requirement or obligation of [**Your Organization Name**] to grant compensatory time off to exempt employees. An employee who has worked significant numbers of hours above and beyond a normal workweek and requests compensatory time off, must obtain approval from his/her supervisor. A supervisor may choose to grant compensatory time off to exempt employees who are required to work in excess of 40 hours per week for special projects or during weekends or any normally scheduled time off. Supervisors may deny the request if the use of compensatory time will "unduly disrupt" the department's operations.

The department manager/supervisor who signs the timesheet is authorized to grant compensatory time off to exempt employees only. The supervisor's approval of the employee's timesheet will constitute the granting of employee's compensatory time. All employees should record the appropriate time worked and time taken on the timesheet.

All compensatory time granted to exempt employees in any workweek must be taken during the two-month period following the end of the workweek during which the compensatory time was earned. Employees cannot be granted compensatory hours in excess of 40 in a two-month period.

Compensatory time off Sample Policy #2

It is the intent of [**Your Organization Name**] to reward sustained periods of exceptional performance by exempt employees. All exempt organizational employees will be eligible to participate under the provisions of this policy. However, the organization assumes that extra hours, weekend or evening work may, from time to

time, be required of exempt employees without supplemental compensation, and these instances do not fall within the purview of this policy.

Compensatory time to deserving employees or project teams will be provided in “awards” of unscheduled time in one of the following frequencies: half-day, one-day, three-day or one-week awards. Decisions when providing such awards will be made on the basis of the efforts expended by the employee or team, the duration of such efforts and the value those efforts represented to the organization’s business and its development and success. Any time off award must be taken by an employee within 60 days of the date of award, and awards are fully redeemable by the organization. Thus, a grantee whose project schedule will not permit an absence within this time frame will receive the award amount in pay in lieu of compensatory time off. Regardless of work schedules, any grantee may elect to take an award in pay in lieu of time off.

Supervisors and managers are expressly empowered to make recommendations based on extraordinary work requirements for sustained periods of performance by employees and teams. Once recommended, at least one level of senior management must concur with the award recommendation.

[Your Organization Name] cannot outline prescribed requirements for recommendations for these awards since circumstances will vary greatly within the operating elements of the organization. However, to provide some clarification of when awards may be appropriate, the following examples are provided:

(1) Program team A has been engaged as a group in a project effort that has required team members to work seven days running for a period exceeding one month in order meet the major project milestones. *Possible recommendation for program team A members: Three-day award.*

(2) Conservation planning employee B has been involved in a project that has required continuous observation, notations and record keeping for investigative research for a new potential conservation policy, has resulted in a continuous on-site presence for 10 days. *Possible recommendation for conservation planning employee B: Three-day award.*

(3) Operations employee C: The vendor-supplied database modules failed, and Operations employee C was required to recreate the database. In order to do so, the employee was required to remain at work on-site for a period of 27 continuous hours. *Possible recommendation for operations employee C: one-day award.*

Reimbursements

Employees are entitled to reimbursement for purchases under \$_____ made with their own funds. Requests for reimbursement must be submitted in written form with attached documentation of all items purchased.

Purchases over \$ ____ need to be pre-approved by his/her supervisor.

[your organization name] reimburses employees for the actual cost of authorized travel (excluding mileage which is reimbursed at a standard rate), meals and lodging which are incurred within the course of employment duties. Requests for reimbursement shall be submitted in writing with documentation of expenses, such as the date of and receipt for each expense. The Executive Director or his/her designee shall inform all employees of approved mileage reimbursement rates. Request for mileage reimbursement shall be submitted in writing with documentation of destination, date and mileage for each trip.

Salary Administration

[Your Organization Name] believes that pay increases should be related to an employee's performance. During formal performance feedback, the supervisor/manager will rate the employee's performance according to his or her performance against deliverables and objectives. Factors will include how well the employee has met the objectives agreed upon in the last review and the employee's level of contribution to the success of the organization.

[Your organization name]'s rating scale is:

[insert numeric rating scale and descriptors used in performance feedback system]

A decision relating to the employee's merit increase in pay will be made by the supervisor/manager after the annual performance feedback process has been completed. The supervisor/manager will forward a merit increase recommendation with the feedback documentation to the next level of management. Merit increases in pay are neither automatic nor periodic. They are reserved for employees who show skills improvement and higher than average performance. Information about rates of pay and merit increases in pay, if any, are deemed to be confidential matters between [Your Organization Name] and each employee and are not to be discussed among employees.

Payroll Deductions

The following mandatory deductions will be made from every employee's gross wages: federal income tax, Social Security (FICA) taxes and applicable state and municipal taxes.

Every employee must fill out and sign a federal withholding allowance certificate, IRS Form W-4, on or before his or her first day on the job. This form must be completed in accordance with federal regulations. The employee may fill out a new W-4 at any time when his or her circumstances change. Employees who paid no federal income tax for the preceding year and who expect to pay no income tax for the current year may fill out an Exemption from Withholding Certificate, IRS Form W-4E. Employees are expected to comply with the instructions on Form W-4. Questions regarding the propriety of claimed deductions may be referred to the IRS in certain circumstances.

Other optional deductions include the portion of group health insurance not paid by **[Your Organization Name]**, which is deducted from each payroll check. Other voluntary contributions (if applicable), such as pension (403b) plan, are also deducted each pay period.

Every employee will receive an annual Wage and Tax Statement, IRS Form W-2, for the preceding year on or before January 31. Any employee, who believes that his or her deductions are incorrect for any pay period, or on Form W-2, should check with the **[identify the appropriate department or person]** immediately.

Employee Benefits

Insurance

[Provide here the general details of [Your Organization Name]'s insurance coverage, if any. Include details about the kinds of insurance available (for example health, prescription drugs, dental and life) who is eligible, and when changes to coverage can be made. An example of language appears below. Include the specific details about [Your Organization Name]'s insurance coverage in the Appendices]

[Your Organization Name] offers all full-time employees a group medical insurance plan, the benefit terms of which are included at the end of the Employee Handbook in Appendix A. Each employee in the plan will receive a booklet completely detailing its policies, procedures and benefits. Each full-time employee will have the option to join or waive participation. The employee shall select the range of coverage – if available - when enrolling in the plan, e.g. employee only, full family coverage, medical, dental, etc. The employee shall pay **[insert percentage here]** percent of the coverage – to be deducted on a pre-tax basis at each pay period - and **[Your Organization Name]** shall pay **[insert percentage here]** percent. Note that coverage rates are reevaluated and adjusted by the insurance company on an annual basis.

Eligibility

1. The employee is a full-time employee.
2. The employee is eligible for coverage effective on the first day of the month following the date of full-time employment.

Changes to the employee's health insurance benefits can be made at any time for reasons of life-event changes such as the birth or adoption of a child, divorce, loss of coverage through the spouse's employer, etc. All other changes can only take place during the open enrollment period **[insert month here]** that is the month prior to the organization's insurance anniversary date of **[insert date here]**.

In addition, **[Your Organization Name]** provides group life and accidental death and dismemberment insurance coverage to full-time employees.

[Your Organization Name] has the right to change insurance companies or to modify or terminate eligibility requirements, benefits, or coverage at any time.

Retirement--401(k)/403(b) Program

[If your organization can provide any retirement--401(k)/ 403(b)--plan(s), this is where you would provide details. Include information about who is eligible, how much can be contributed, rollovers, loans, and any special conditions for hardship. An example of language appears below. You will have to customize this to describe your particular retirement plan administrator's requirements. Or, you can describe the basics of the plan here and refer employees to the SPD (summary plan description) for additional information.]

The [Your Organization Name] offers employees the opportunity to participate in a [insert type of program here], administered by [insert name of administrator].

Eligibility – You will be eligible to enter the plan after you have completed [insert number of months here] of employment and are at least 21 years old. You may begin your deferral on the January 1st, April 1st, July 1st, or October 1st following the completion of these eligibility requirements.

Contributions – You can contribute up to [insert percentage here] percent of your compensation on a pre-tax basis (up to [insert maximum here] for [insert current year]).

In general, there is a core group of [insert pertinent number here] funds from which to choose. You can allocate percentages of your contributions among any or all these funds.

Transfer of monies between your fund choices is allowed [insert time parameters here]. Changes in funds or changes in allocation of your percentage of contribution to any or all of your funds are allowed.

Statements: Participant statements will be prepared on a quarterly basis and mailed to your home address.

Rollovers – The 403(b) Plan will accept qualified rollover distributions from your date of hire.

Loans – Loans [insert minimum and maximum amounts here] are available up to [insert percentage amount of vested account balance]. The interest rate will be [insert rate here and whether loan set up charges will be incurred].

Hardship — Monies, which do not have to be repaid, may be withdrawn from your 401(k) plan only for [insert conditions here]. Fees, penalties, and taxes will be charged to any such withdrawal.

Vacation

[Provide in this section the details of your organization’s vacation policy. Include information about how much time is allotted/accrued, who is eligible, how to schedule, and what happens to time that is left over when employment is terminated. An example of language appears below. You will have to customize this to meet your organization’s requirements. Most organizations’ vacation policy includes a modest increase in vacation accrual over time.]

All full-time employees are entitled to paid vacation and paid personal days each year to be accrued evenly over the course of the year. See vacation accrual plan below. Employees who begin after January 1st will accrue vacation time on a pro rata basis. Vacation not taken during the calendar year is forfeited.

EE status	6 months	1 year	3 years	5 years	10 years
Full-time	5 days	10 days	12 days	15 days	20 days
½ time	2.5 days	5 days	6 days	7.5 days	10 days

New employees become eligible to take vacation after they have successfully completed their introductory period. The accrual of vacation leave begins with the first full month of employment. However, no paid vacation leave may be taken prior to the end of the introductory period. The maximum amount of vacation leave an employee may accrue is the amount equal to their annual accrual total. When an employee's accrual maximum has been reached, the employee must either use vacation leave or lose the right to accrue additional days.

All vacations must be scheduled in advance with the employee's supervisor/manager. Employees are primarily responsible for coverage of their duties while on vacation leave. Vacation leave schedules and coverage are subject to the approval of the employee's supervisor. Employees are responsible for planning ahead for vacation and working out a complete schedule with their supervisor/manager. Vacation accrual is administered by the **[insert appropriate department or name]**.

Accrued unused vacation leave shall be paid only upon termination. Upon termination, the employee's accrued, but not taken, vacation hours will be added to the final paycheck using the employee's then-current straight-time hourly rate for conversion.

Holidays

[Provide in this section a list of your organization's paid holidays and whether there are floating holidays. An example of a list that is typical for many organizations is provided below]

[Your Organization Name] provides ten (10) paid holidays (8 scheduled and 2 floating) each year. The organization is officially closed on these days:

January	New Year's Day
May	Memorial Day
July	Independence Day
September	Labor Day
November	Thanksgiving Day
November	Day after Thanksgiving
December	24th
December	25th
Floating	
Floating	

** If these holidays fall on a Saturday, the preceding Friday will be a holiday. If they fall on Sunday, the following Monday will be a holiday.*

The two "floating" holidays are to be determined by the employee and approved by his or her supervisor.

Only regular full-time and part-time employees are eligible for holiday pay. Temporary employees are not eligible for holiday pay.

If a designated holiday falls within an employee's vacation period, the holiday is not considered a vacation day. Employees may take religious holidays not designated as a [Your Organization Name] holiday either as a floating holiday or without pay. Prior approval in advance must be obtained from the employee's supervisor/manager.

Sick Days

In the event that an employee gets sick, [Your Organization Name] provides all full-time employees with [insert number here] sick days, effective after [insert number here] consecutive days of employment. Part-time employees will earn sick or personal leave at half of the full-time rate [or on a pro-rated basis]. Temporary employees are not eligible for sick or personal leave.

It is in the best interests of an employee who is ill or injured that the employee not remain at work. It is the supervisor or manager's responsibility to send the employee home if the employee is incapacitated.

Employees are encouraged to make their routine doctor or dentist appointments with minimal disruption to the workday, if possible. If time off is required for such appointments, arrangements should be made in advance with the employee's supervisor or manager.

An employee is expected to notify his or her supervisor/manager at the beginning of each workday during illness or injury. Exceptions to this include a serious accidental injury or hospitalization, or when it is known in advance that the employee will be absent for a certain period of time.

A medical statement from the employee's doctor may be requested by the **[Your Organization Name]** when an employee is absent from work for more than five working days.

Employees may use sick leave for either personal illness, medical or dental appointments, or illness of immediate family members. For purposes of this policy, immediate family member is defined to include the employee's spouse, partner, parent, sibling, child, or any person living with the employee. Absences of more than ten consecutive workdays require a doctor's certification. Under no circumstances will unused sick leave be cashed out upon termination.

Catastrophic Leave

Purpose

Catastrophic Leave is a leave sharing program intended to provide a means for employees to assist another employee who, because of a personal non-occupational catastrophic illness or the catastrophic illness of a family member, may go on leave without pay, or leave **[Your Organization Name]** employment.

A catastrophic illness of an employee is any non-occupational illness, injury or physical or mental condition of such serious nature as to require long-term absence from work. Catastrophic illness of a family member shall be defined as those illnesses, injuries, or physical or mental conditions which are of such serious nature as to require long-term and/or full-time care by the employee. Family members are defined as the employee's spouse/domestic partner, parent, parent-in-law, sibling, child, or other person for whom the employee is legal guardian.

Employees will be allowed to donate or receive accrued vacation or sick hours in accordance with this rule.

Terms and Conditions

An employee may be eligible to receive and use donated leave, if he or she, or their family member, has a catastrophic illness as defined above.

The recipient employee must file with the Executive or Associate Director a medical certificate from their health care practitioner or the family member's health practitioner, verifying eligibility under these criteria. The Executive or Associate Director will provide a copy of the certificate and the request to use donated leave to [Your Organization Name]'s Operations Manager.

[Your Organization Name] retains the right to require periodic medical certification to verify eligibility. Periodic updates are typically one per month. Eligibility shall cease when the employee can return to work or the family member is once again able to care for him/herself.

An employee may receive and use leave donated by another [Your Organization Name] employee under the following conditions:

An employee who receives any donated leave credits must **first** exhaust all earned leave credits, including personal leave, vacation and sick leave up to the amount authorized by the human resources policies.

In order to receive and use donated leave, an employee must not be receiving any other salary continuation benefits such as long-term disability benefits, retirement benefits or social security. The Operations Manager will confirm this.

Donated leave may not be used to extend employment beyond the point that it would otherwise end by rule or law. For example, if an employee would have otherwise been terminated due to layoff or other reasons, donated leave may not be used to extend employment.

An employee who uses donated leave is not on "pay status" and does not accrue personal holidays, vacation, or sick leave benefits nor do they earn pay for holidays.

If an employee is otherwise eligible for [Your Organization Name]-paid health benefits the employee will continue to receive those benefits while receiving donated leave.

Limits on Leave Donation

An employee may only receive catastrophic leave donations up to the amount of time the health care provider had indicated the employee will be unable to work. For the care of the employee's family member, catastrophic leave donations may only be received for the amount of time the health care provider has indicated the family member will require long-term or full-time care.

After an employee has received and used a maximum of 520 hours of donated paid leave, the employee must return to work, take leave without pay or terminate from employment with **[Your Organization Name]**. At no time may an employee have more than 520 hours of donated leave.

Donated Time Not Used

When the recipient employee returns to work, any donated leave which was not used by the recipient will become sick leave and be retained by the recipient.

Eligibility to Participate

An employee who has successfully completed **[Your Organization Name]**'s introductory period and is eligible to receive vacation leave is eligible to participate in the Catastrophic Leave sharing plan as a recipient or donor but is bound by the requirements under the provisions of this personnel rule.

Conditions for Making Leave Donations

An employee may donate leave to another **[Your Organization Name]** employee under the following conditions:

- a. Donors may donate accrued vacation and/or sick time.
- b. Donations must be made in increments of whole hours.
- c. Donors must sign a declaration that their donation is voluntary, is intended as a gift, and has been made without coercion, compensation or for other consideration.
- d. Donations are irrevocable. If the recipient employee returns to work, or terminates employment for any reason, the leave donated to him or her will be converted to sick leave per the section on Donated Time Not used.

Calculating Donated Leave

Donated sick and vacation time is transferred as one hour donated equals one hour received sick leave. The recipient receives the donation at his or her rate of pay.

Solicitation of Donations

Donations may be solicited by the recipient employee or on his or her behalf by coworkers or their representatives. **[Your Organization Name]** may, at the recipient employee's request, notify **[Your Organization Name]** employees that the recipient employee is eligible to receive voluntary donations of accrued vacation and sick leave, but may not solicit donations on the employee's behalf. **[Your Organization Name]** may not release any medical information regarding the recipient employee or his or her family member, unless authorized by the employee or family member.

Employees are prohibited from threatening or coercing other employees concerning any aspect of this rule including, but not limited to, pressuring another employee to donate time or refusal to accept donated time.

Leave of Absence and Military Leave

A leave of absence is time off in a non-pay status. Upon receipt of a formal written request for leave of absence from regular full-time employees, management will determine whether a leave of absence will be granted. (Also see Medical/Family Leave policy.)

The employee is expected to request leave of absence with as much advance notice as possible. Leaves of absence will not be granted for periods less than two weeks in duration. Vacation or sick leave should be used for such absences.

The reason for leave should fall into one of the following categories:

- Military
- Personal

The leave classifications are defined as follows:

Military — To protect the employment rights of employees entering the armed forces of the United States and to ensure conformance with the applicable federal laws, a leave of absence must be granted to all employees, except temporary, who enter military service for active duty as a result of the following:

- Initial enlistment in the armed services of the United States;
- Initial training period in the National Guard;
- Being ordered to active military service as a member of the Reserves or National Guard for an indefinite period or for a periodic training period up to ten working days; and
- Any service requirements under the Selective Service Act.

Personal — Except for those situations covered under the Medical/Family Leave policy, personal leaves may be granted to employees having special nonmedical personal needs for an extended period of absence. Each case will be evaluated on its own merits, and the following will be taken into consideration:

1. The reason for the request;
2. The amount of time required; and
3. The employee's length of service and past record.

Normally, unpaid personal leaves are granted for periods of up to 90 days if they don't interfere unduly with the organization's work.

Return to Work

See Medical/Family Leave policy for details on reporting during leave and return from leave. Exceptions to this policy are for those employees who are granted military leave of absence. They are entitled to full re-employment rights subject to the governing federal and state laws.

Employees who do not return to work after any leave of absence will be terminated effective on the last day of work or paid leave, whichever is later.

Benefits during Approved Leave of Absence

Holidays — To be paid for a holiday, an employee must be in active pay status the day before and the day after the holiday. Employees are not eligible to receive pay for any holiday during the leave period.

Vacation — No vacation hours are earned during the leave period. Employees requesting a leave of absence for medical or military reasons may choose to use all earned vacation before beginning the leave of absence. Employees requesting a personal leave of absence must use all earned vacation before beginning the leave of absence.

Sick or Personal — No sick or personal hours are accumulated during the leave period.

Insurance — [Your Organization Name] will continue the employee's insurance benefits on a leave of absence approved only under the Medical/Family Policy described below, provided that the employee continues to pay his or her portion of the premiums. In the case of military leaves, insurance benefits will be continued for up to ten working days per year starting with the day military leave begins.

Medical/Family Leave

[The Family Medical Leave Act applies to organizations of 50 employees or more. Your company may decide to adhere to the Act's policies, however, even if you have fewer than 50 employees. An example of a Medical and Family Leave Policy is outlined below.]

[Your Organization Name] understands that its employees on occasion will have the need to take an extended period of time away from work to care for their child after birth or adoption or foster care placement, to care for their spouse/partner, child or parent with a serious health condition, or because of a serious health condition of their own. In recognition of this need, the Company has voluntarily adopted the following **Medical and Family Leave Policy** as a benefit of employment.

Eligibility Requirements. To qualify for leave under this policy, you must have been employed by [Your Organization Name] for at least 12 months and you must have worked 1250 or more hours in the previous 12 months.

1.1 Up to 12 weeks of unpaid medical and family leave is allowed under the conditions described in paragraph 4.

Reasons for Leave. Leave under this policy may be taken:

- to care for your child after birth or adoption or after state placement of a child with you for foster care;
- to care for your partner, spouse, child or parent who has a serious health condition; or
- for a serious health condition that makes you unable to perform the essential functions of your job.

Procedures

Notice. You must provide **[Your Organization Name]** with thirty days' notice if the absence is foreseeable. If the leave of absence is not reasonably foreseeable you must notify **[Your Organization Name]** as soon as practicable. Any failure to give a timely notice may cause your leave to be delayed.

Request. To request family/medical leave, you should obtain, complete, and sign a Medical/Family Leave Request Form ("Request Form") and submit it to **[insert appropriate department]** or your supervisor.

Doctor's Certification. If the reason for the leave request involves a serious health condition (either yours or your family member's), you must also obtain and submit a completed and signed Certification of Health Care Provider (see sample or is this something that a doctor has "Certification Form") within 15 days of submitting the Request Form.

Second Opinion. Should **[Your Organization Name]** disagree with the opinion given by your health care provider, **[Your Organization Name]** reserves its right to require opinions from second or third health care providers at the **[Your Organization Name]**'s expense.

Third Opinion. If the two doctors disagree about your condition, a third health care provider, agreed upon by you and the **[Your Organization Name]**, will render a binding decision.

Notice of Designation. After receiving the completed forms, the Executive Director or **[insert appropriate individual]** will designate the leave as either Medical/Family Leave or non-Medical/Family Leave, and provide you with a Notice of Medical/Family Leave Rights and Responsibilities ("Medical/Family Leave Notice") reflecting that designation.

Reporting During Leave. You will be required to furnish **[Your Organization Name]** reports on your status, intent to return and recertification of the serious health condition every 30 days.

Substitution of Other Kinds of Leave. **[Your Organization Name]** requires that you use all available paid leave time, such as sick leave, vacation or personal time before your twelve weeks on unpaid Medical/Family leave takes effect.

Benefits during Leave

Health Insurance. **[Your Organization Name]** will maintain any health insurance coverage that you have at the time of your Medical/Family Leave for the duration of the leave. You will be required to pay your normal health insurance premium during Medical/Family Leave.

Accrual of Other Benefits. You will not accrue sick leave or vacation leave while on Medical or Family leave. In addition, all other benefits provided by **[Your Organization Name]** may cease during the leave. You will be reinstated to your current position or to an equivalent position as described in paragraph 6.3 without any need for requalification upon your return.

Return from Leave

Failure to Return. When Medical/Family Leave expires, your failure to return to work will be grounds for immediate termination unless a written extension is obtained from your supervisor.

Fitness for Duty Certificate. Where your leave was taken because of your own illness or injury, you must provide a fitness-for-duty certification from a health care provider before your return. A failure to do so may cause a delay or denial in your reinstatement.

Reinstatement. Upon your return, you will be entitled to reinstatement to your current position or to an equivalent position with the same pay and benefits, subject to the [Your Organization Name]’s business needs.

Exception. If you are a salaried exempt employee paid in the top 10 percent of [Your Organization Name] employees within 75 miles of your facility you may forfeit your right to reinstatement under certain conditions. You will be informed of this possibility when notice is given or as soon thereafter as practical under the circumstances.

False Claims. An employee who fraudulently obtains Medical/Family Leave from [Your Organization Name] is not protected by this policy’s restoration or maintenance of health benefits provisions and will be subject to appropriate disciplinary action including discharge.

Bereavement Leave

[Your Organization Name] will pay for time off in the event of death of the following immediate family members:

Spouse/Partner	Grandchild	Sister
Parent	Grandparent	Father-in-law
Child or Stepchild	Brother	Mother-in-law

The employee and supervisor/manager will determine the amount of time the employee will be absent from work. The maximum paid leave is [insert number of days here] in addition to all other paid leave.

Leave for attendance at the funeral of a non-immediate family member or person with an especially close relationship may be granted with or without pay. Typically paid leave is reserved for the death of immediate family members. The employee’s supervisor will make determination after consultation with other key manager(s) – if needed.

Jury Duty

[Your Organization Name] will grant employees time off for mandatory jury duty or court appearances as a witness when the employee must serve or is required to appear as a result of a court order or subpoena. A copy of the court order or subpoena must be supplied to the employee’s supervisor/manager when requesting time off.

The employee is entitled to full pay for each day of jury duty or service as a witness up to a maximum of [insert number of days here] per year, in addition to any other paid leave. However time off for court appearances as a party to any civil or criminal litigation shall not be compensated and the employee must arrange for time off without pay or use accrued vacation or personal leave for such appearances.

Voting

[Your Organization Name] encourages all employees to vote. Employees are encouraged to take advantage of polling hours prior to the beginning or following the end of your workday.

If this cannot be arranged, your supervisor/manager will approve time off to vote either at the beginning or end of your workday, provided that you give at least one day’s notice to your supervisor/manager.

Travel Reimbursement

[Provide in this section the details of your organization's procedures about travel reimbursement. While details including items such as insurance will vary, an example of language appears below]

This policy establishes the general guidelines and procedures to be followed when business travel is required:

- Travel-related expenses are to be detailed on the [Your Organization Name] travel reimbursement form;
- Employees who prefer to use their personal vehicles for their convenience on [Your Organization Name] business, including trips to the airport, will be reimbursed at the standard mileage rate provided by the IRS, assuming that the time and distance involved is reasonable under the circumstances;
- All parking expenses and highway tolls incurred as a result of business travel will be reimbursed;
- All air travel must be approved in advance by the employee's supervisor/manager. All personnel will travel economy class unless extenuating circumstances require business or first class travel. The duplicate airline ticket receipt should be attached to the [Your Organization Name] reimbursement form;
- [Your Organization Name] insures employees who fly when traveling on organizational business with a travel accident rider to our regular group insurance policy. Purchase of additional air travel insurance is not a reimbursable expense;
- Employees should request advance approval for use of a rental car at their destination. If a rental car is used, additional insurance should not be purchased because of our existing insurance coverage. A copy of the rental car agreement form must accompany the travel reimbursement form;
- Employees should select moderately priced lodging convenient to their destination to minimize time and expense. A detailed receipt from the hotel or motel must accompany the reimbursement form unless such is unavailable, in which case a credit card receipt is acceptable;
- Employees must submit receipts for meals or accept the allowable per diem rates with the reimbursement form. Reasonable tips, when paid by the employee and noted on the receipt, will be reimbursed;
- Travel reimbursement requests are due in the [insert appropriate department or individual] within five working days of the end of the month in which expenses are incurred.
- Per diem reimbursement will be provided for authorized expenses incurred while traveling on business. This is defined as overnight travel at distances more than (50) miles from the employee's home or primary work site.

[Your Organization Name]'s per diem rate is based on the U.S. Government General Services Administration guidelines that provide comparable rates for various US locations. These rates apply primarily to hotel and meals but also provide information on various incidental expenses.

View the guidelines here: http://www.gsa.gov/portal/content/104877?utm_source=OGP&utm_medium=print-radio&utm_term=perdiem&utm_campaign=shortcuts

Per diem reimbursements are based on departure and return times over the entire 24-hour day and pro-rated accordingly.

Receipts are not required for per diem allowances, which are reimbursed after travel is completed using the standard expense reimbursement form.

Use of Rental Car on [Your Organization Name] Business

[Insurance information will vary, but example language for a rental car policy appears below]

Employees required to travel because of their job responsibilities may rent a car upon receiving the approval of their supervisor/manager.

An economy or compact size car will be the employee's first choice in obtaining a rental car. **[Your Organization Name]** is self-insured [or insured] for damage to rental cars used on organizational business. Any additional insurance charges offered as an option by the rental company are not reimbursable.

A copy of the rental car agreement must accompany the employee's monthly travel expense report.

Conferences and Meeting

Employees may request time off or **[Your Organization Name]** financial support or both to attend conferences or meetings sponsored by institutions or professional organizations. The subject matter to be presented must relate directly to the employee's position or provide beneficial information to be shared in the employee's department.

The employee's supervisor/manager and the Executive Director must approve the employee's participation in the conference or meeting.

[Your Organization Name] will pay for the following expenses if attendance is approved: registration fees, travel costs, lodging and meal expenses not covered by registration.

Time off for attendance and travel during normal working hours will be paid at the normal rate of pay.

Miscellaneous Policies

Confidentiality

[Your Organization Name] computers and e-mail system are **[Your Organization Name]** property.

All employees are expected to use good judgment in using electronic mail and to avoid indiscretions such as offensive or inappropriate messages or any other message **[your organization name]** deems inappropriate. E-mail messages should be used for business and not for matters unrelated to the organization's affairs. Misuse of e-mail may result in disciplinary action up to and including termination.

Software Usage Policy

[Your organization's systems, applications, and software may vary, but example language setting out a policy on software use appears below]

Purpose

To reduce the legal exposure to the [Your Organization Name] of unlicensed software and reduce the effort required to operate and troubleshoot employee's machines, this policy has been established to restrict the installation of unauthorized software.

Scope

This policy covers all desktop and laptop computers owned or operated by [Your Organization Name] and covers operating systems, 3rd party software, freeware and shareware applications and utilities. This policy does not govern servers. Servers will be under IT support.

Policy

The following list of operating systems and applications are authorized for use by [Your Organization Name]. For information regarding the specific release of software, please contact IT or your local administrator.

Operating Systems:

- Windows 7
- UNIX and Linux operating systems (**choose one**)(will be made available for application design and deployment) **OR** (will only be permitted with the direct approval of the IT or the Operations Manager).
- Intel Based Software Applications
- The following list of software applications is authorized for use by [Your Organization Name] employees on Intel-based desktop and laptop systems: (**list software**).
- Base Software:
- All systems will have the following basic software installed:
- XXXX Anti-Virus Corporate Software
- Terminal Services Client
- Virtual Control Software
- Internet Explorer
- WinZip
- Adobe Acrobat (where required)
- Standard Office Productivity Software:
- All systems will have the following basic software installed or will be connected to a Terminal Server running this software:
- Microsoft Outlook, Word, and Excel.

- PowerPoint and Access will be given to those who require them.

Software Not Permitted Without Permission

Due to network implications and security issues, the following software will not be allowed on any computer unless approved by IT or the operations manager.

This list does not contain all the possible software applications that cannot be installed. If any software has been loaded onto your machine that does not belong on the computer please request it be removed by the IT team. If software is found on your computer that does not belong, it will be removed and you will be held responsible. If you are not sure, contact your local administrator or IT.

- Yahoo Messenger and ICQ
- Stock Tickers and Streaming Radio
- Any additional screen savers (Web Shots etc.).
- Any additional desktop patterns
- Distributed file sharing utilities (KaZaA, Morpheus etc.)
- Network sniffing or protocol analysis programs
- Password “cracking/decryption” tools
- Terminal emulation or Xwindow clients

Enforcement

Any employee found in violation of this policy may be subject to disciplinary action.

Telecommuting/Virtual Offices

[Your organization name] considers telecommuting to be a viable alternative work arrangement in cases where individual, job and supervisor characteristics are best suited to such an arrangement. Telecommuting allows an employee to work at home, on the road, or in a satellite location for all or part of their regular workweek. Telecommuting is a voluntary work alternative that may be appropriate for some employees and some jobs. It is not an entitlement; it is not an organization-wide benefit; and it in no way changes the terms and conditions of employment with **[your organization name]**.

[Your organization name] will determine, with information supplied by the employee and the supervisor, the appropriate equipment needs (including hardware, software, modems, phone and data lines, facsimile equipment or software, photocopiers, etc.) for each telecommuting arrangement on a case-by-case basis.

The **[insert appropriate departments or individuals]** will serve as resources in this matter. Equipment supplied by the organization will be maintained by the organization. Equipment supplied by the employee, if deemed appropriate by the organization, will be maintained by the employee.

[Your organization name] accepts no responsibility for damage or repairs to employee-owned equipment. **[Your organization name]** reserves the right to make determinations as to appropriate equipment, subject to change at any time. Equipment supplied by the organization is to be used for business purposes only. The telecommuter should sign an inventory of all office property and agrees to take appropriate action to protect the items from damage or theft. Upon termination of employment, all **[Your Organization Name]** property will be returned to the organization, unless other arrangements have been made.

Consistent with the organization's expectations of information asset security for employees working at the office full-time, telecommuting employees will be expected to ensure the protection of proprietary and confidential information accessible from their home office. Steps include, but are not limited to, use of regular backup, locked file cabinets, CD boxes and desks, regular password maintenance, and any other steps appropriate for the job and the environment.

The employee will establish an appropriate work environment within their home for work purposes. **[Your organization name]** will not be responsible for costs associated with initial setup of the employee's home office such as remodeling, furniture or lighting, nor for repairs or modifications to the home office space. Employees will be offered appropriate assistance in setting up a workstation designed for safe, comfortable work.

[Your organization name] will supply the employee with appropriate office supplies (pens, paper, etc.) for successful completion of job responsibilities. The organization will also reimburse the employee for all other business-related expenses such as phone calls, shipping costs, etc., that are reasonably incurred in accordance with job responsibilities.

Telecommuting employees who are not exempt from the overtime requirements of the Fair Labor Standards Act will be required to record all hours worked in a manner designated by the organization. Hours worked in excess of those specified per day and per work week, in accordance with state and federal requirements, will require the advance approval of the supervisor. Failure to comply with this requirement can result in the immediate cessation of the telecommuting or home office agreement.

Telecommuting or home offices are NOT designed to be a replacement for appropriate childcare. Although an individual employee's schedule may be modified to accommodate childcare needs, the focus of the arrangement must remain on job performance and meeting organizational demands. Prospective telecommuters are encouraged to discuss expectations of telecommuting with family members prior to entering into a telecommuting arrangement. A trial period of three months may be the appropriate first step.

Gratuities to Government Employees

In adherence to government regulations, no employee may offer a gratuity to any government employee or official on behalf of, or in pursuance of, **[Your Organization Name]** business. Gratuities are defined as meals, drinks, gifts, expenses, cash or any other item of value, including personal service.

[Your Organization Name] strictly forbids any form of a business gift to federal, state, or municipal employees. Management is charged with the responsibility of informing all employees of this policy and maintaining adherence to it.

Violation of this policy will be treated as a major violation and, depending on the circumstances, may be grounds for immediate termination or other appropriate action.

Employee Privacy

[Your Organization Name] recognizes our employees' rights to privacy. In achieving this goal, the **[Your Organization Name]** adopts these basic principles:

- The collection of employee information will be limited to that which the organization needs for work and legal purposes.
- The confidentiality of all personal information in our records will be protected.
- All in-house employees involved in record keeping will be required to adhere to these policies and practices. Violations of this policy will result in disciplinary action.
- Internal access to employee records will be limited to those employees having an authorized, business-related, need to know. Access may also be given to third parties, including government agencies, pursuant to court order or subpoena.
- **[Your Organization Name]** will refuse to release personal information to outside sources without the employee's written approval, unless legally required to do so.
- Employees are permitted to see the personal information maintained about them in **[Your Organization Name]** records. They may correct inaccurate factual information or submit written comments in disagreement with any material contained in their **[Your Organization Name]** records.

Kitchen/Break Room

[Insert information here about a kitchen or break room if such information is pertinent. Example language is shown below]

[Your Organization Name] provides a kitchen/break room for the benefit of its employees. Employees shall be responsible to keep the area clean, including the washing of personal dishes and utensils.

All trash should be disposed of in the trash container. Any empty aluminum cans or plastic or glass bottles shall be disposed of in the recycle container marked "Aluminum Cans Only" or "Glass Bottles Only," whichever is applicable.

Emergency Closings

Except for regularly scheduled holidays, **[Your Organization Name]** will be open for business on Mondays through Fridays during normal business hours. The organization recognizes that circumstances beyond its control, such as inclement weather, national crisis or other emergencies do occur. On such occasions **[Your Organization Name]** may close for all or part of a regularly scheduled workday.

In such event the organization will endeavor to notify all supervisory personnel for the purpose of contacting employees. Employees may also contact their supervisor/manager or **[Your Organization Name]** offices. Any closing longer than one full workday may be assessed against employees' sick leave or vacation time, whichever may be applicable and, if none, the closing may be regarded as unpaid personal leave.

Mail and Shipping

From time to time, employees shall be permitted to utilize the [Your Organization Name]’s shipping resources to arrange for the shipment of personal goods. Any personal use is subject, of course, to the availability of shipping resources and to the priority of business-related shipments. Any costs associated with personal shipments shall be charged back to the employee and shall be promptly reimbursed by the employee to the [Your Organization Name].

EMPLOYEE ACKNOWLEDGMENT

I, _____, acknowledge that I have received and read [Your Organization Name] Employee Handbook and understand its contents. I am aware that I am expected to follow the policies set forth in this handbook. I understand that my employment is at-will and that I may resign or [Your Organization Name] may terminate my employment at any time, for any reason, with or without notice. I understand this handbook supersedes all previous employee handbooks and other employee policies of [Your Organization Name]. If I should have any questions concerning this handbook now or in the future, I also understand that I can address these concerns with my Supervisor.

Employee Signature

Date

APPENDIX

APPENDIX A – Health Insurance Plan

[Insert specific health insurance information here, including such things as deductibles, benefits coverage, how to locate providers and contact information]

APPENDIX B – Prescription Drug Plan

[Insert specific information here about a prescription drug plan, including such things as co-pay options, whether there is a formulary, and how to find participating pharmacies]

APPENDIX C – Dental Plan

[Insert specific dental insurance information here, including such things as the common services that are available, benefits coverage, and whether providers agree to accept a schedule of maximum allowances]

APPENDIX D – Vision Care Plan

[Insert specific vision care insurance information here, including such things as the common services that are available, benefits coverage, and whether providers agree to accept a schedule of maximum allowances]